

# Louisiana Brand Identity Study

## July 2014



*Prepared for Louisiana Office of Tourism*  
*Prepared by RRC Associates ([www.rrcassociates.com](http://www.rrcassociates.com))*

# Outline

## ➤ Objectives and methodology

- Executive summary
- Respondent demographics
- Awareness, interest, and visitation of Louisiana
- Perceptions of Louisiana as a travel destination
- Evaluation of Louisiana Tourism advertising, logo and homepage
- Characteristics of most recent Louisiana leisure trip
- Future leisure travel to Louisiana

# Objectives and Methodology

- Objectives:
  - Measure awareness of and consumer reaction to Louisiana's existing tourism branding and advertising
  - Examine ways to build consumer awareness of brand and propensity to travel to Louisiana
- Methodology: online survey of independent panelists and Louisiana Office of Tourism (LOT) e-newsletter subscribers
  - Nine target Designated Market Areas (DMAs):
    1. Atlanta
    2. Denver
    3. Chicago
    4. Memphis
    5. Nashville
    6. Austin
    7. Dallas
    8. Houston
    9. San Antonio

# Objectives and Methodology

- Sampling details: Independent panel survey
  - Fielded June 17 – 27, 2014
  - Panel source: Survey Sampling Inc.
  - Screener criteria:
    - Age 21-75
    - Household income \$35,000 or more (\$50,000 or more if married or in a domestic partnership)
    - Took at least one overnight leisure trip staying in a hotel or other paid accommodations in the prior 12 months
    - Exclusions: work in marketing/advertising, market research, travel/tourism, or public relations fields
  - Total sample size: n=957.
- Sampling details: LOT email list
  - LOT provided 10,108 deduped emails of e-newsletter recipients in target DMAs and throughout the state of Texas
  - Survey fielded June 19 – 30, 2014. Initial invite emailed June 19, reminder invite emailed June 26.
  - Incentive: Random drawing for one of four \$100 American Express gift cards
  - Response:
    - 750 completed surveys received through 6/30/14 (gross response rate 7.5%)
    - 1,065 people clicked through to the survey (10.5%). 750 of the 1,065 completed the survey (69%).
  - The response is presumed to have skewed old (median age 60) and female (60% female) relative to all LOT listees.

# Objectives and Methodology

- Sample sizes and confidence intervals:

	INDEPENDENT PANELISTS		LOT EMAIL LIST	
DMA	Sample size	95% conf. interval (+/-)	Sample size	95% conf. interval (+/-)
Chicago -- IL, IN	126	8.7%	64	12.3%
Dallas - Fort Worth -- TX	126	8.7%	148	8.1%
Houston -- TX	118	9.0%	110	9.3%
Atlanta -- AL, GA, NC	116	9.1%	40	15.5%
Austin -- TX	101	9.8%	56	13.1%
Denver -- CO, MT, NE, NV, SD, WY	101	9.8%	30	17.9%
San Antonio -- TX	98	9.9%	55	13.2%
Nashville -- KY, TN	93	10.2%	27	18.9%
Memphis -- AR, MS, MO, TN	58	12.9%	29	18.2%
All other DMAs	20	n/a	156	n/a
Undetermined location	0	n/a	35	n/a
<b>TOTAL</b>	<b>957</b>	<b>3.2%</b>	<b>750</b>	<b>3.6%</b>

- Results at DMA level should be interpreted with caution due to modest sample sizes and large confidence intervals

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- Characteristics of most recent Louisiana leisure trip
- Future leisure travel to Louisiana

Results in discussion below focus primarily on *independent panelists*.  
Results from LOT list are highlighted where notable for comparison purposes.

## 1. Awareness, interest and visitation of Louisiana

- Louisiana (LA) has relatively strong top of mind awareness as an appealing travel destination
  - About 1.9% of independent panelists say LA is the state which first comes to mind as an appealing travel destination, ranking LA 8<sup>th</sup> of the 50 states, behind leaders FL (28%), CA (17%), HI (11%), CO (6%), NY (5%), NV (5%), and TX (5%), but ahead of other states (including LA's other neighbors in the south).
    - Top of mind awareness of LA is strongest in Memphis, San Antonio, Austin & Houston (3-5%)
    - New Orleans dominates as an appealing destination within LA
  - Additionally, 10% of panelists cite LA as among the four states that first come to mind as appealing travel destinations – 9<sup>th</sup> of the 50 states (behind the same states as above, and WA).
    - Awareness highest in Austin (18%), Houston (14%), San Antonio (12%)
    - Intermediate in Dallas and Nashville (9% each)
    - Lowest in Denver (7%), Chicago (4%), and Atlanta (4%)
  - Among LOT listees, LA is the leading top-of-mind state (42%), although results are likely biased upwards since survey invite came from LOT
- Awareness of Louisiana travel advertising is relatively high
  - Among independent panelists, LA is the fifth-most recalled state for tourism advertising (14% unaided), behind FL (36%), TX (24%), CA (21%) and MI (19%). Aided recall of LA advertising is 10 points higher (24%).
    - Unaided recall is highest in San Antonio and Austin (27% each), and lowest in Atlanta (4%), Chicago (6%) and Denver (9%).
    - Respondents are particularly likely to recall travel advertising from their home state or adjacent states, suggesting that DMOs heavily target such markets as a common practice.

## 1. Awareness, interest and visitation of Louisiana (cont'd)

- Louisiana has moderately high familiarity as a leisure travel destination
  - About 32% of panelists consider themselves familiar with LA as a travel destination (top 2 box).
    - Behind FL (65%), TX (57%), CA (53%), but similar to TN (32%), and ahead of GA (29%), MI (18%), MS (15%), and MO / AR / AL (14% each).
    - Familiarity is highest in Houston (56%), followed by Memphis (38%), Austin (36%), Dallas & San Antonio (34% each), Atlanta (31%), Nashville (21%), Chicago (18%) and Denver (17%).
    - LOT listees are especially likely to consider themselves familiar with LA (69%).
- Louisiana has moderately high interest as a leisure travel destination
  - About 37% of panelists expressed interest in LA as a leisure travel destination (top 2 box).
    - Behind FL (74%), CA (71%), and TX (52%), but ahead of TN (35%), GA (31%), MI (22%), MO/MS (16% each), and AR/AL (14% each).
    - Interest is highest in Memphis (47%), lowest in Denver (29%) and Chicago (30%), and intermediate in other target DMAs (37 – 43%). Interest appears to be impacted by proximity effects (closer proximity=greater interest, to some degree; proximity effects also noted for numerous other travel interest/awareness measures).
    - LOT listees are especially likely to consider themselves interested in LA (88%).
- Louisiana has moderately high likelihood of visitation in next 12 months
  - About 38% of panelists said they were likely to travel to LA for leisure in next 12 months.
    - Behind FL (59%), TX (56%) and CA (47%), but ahead of TN (35%), GA (30%), MI (20%), MO (19%), and MS/AR/AL (18% each).
    - Share likely to visit highest in Houston (59%); intermediate in Austin (41%), San Antonio (40%), Atlanta (40%), Dallas (39%), and Memphis (38%); and lowest in Chicago (32%), Nashville (24%), and Denver (24%).
    - LOT listees are especially likely to expect to visit LA in next 12 months (84%).



## 1. Awareness, interest, and visitation of Louisiana (cont'd)

- Louisiana has moderate levels of leisure visitation in previous two years
  - About 24% of panelists visited LA for leisure in the prior two years.
    - Behind TX (44%), FL (43%), and CA (28%), but similar to TN (23%), and ahead of GA (19%), MS (12%), AL/MO (11%), and MI/AR (10%).
    - Recent visitation exhibits strong proximity effects: highest in Houston (51%), followed by Austin (35%), Dallas (28%), San Antonio (27%), Memphis (21%), Nashville (17%), Denver/Chicago (13% each), and Atlanta (11%).
    - LOT listees are especially likely to have visited LA in previous two years (79%).
- Louisiana has high level of leisure visitation ever, including in remote markets
  - About 60% of panelists visited LA for leisure previously.
    - Previous visitation highest in Houston (79%), followed by Austin (66%), Dallas/San Antonio/Memphis (65% each), Denver (53%), Nashville (49%), and Chicago/Atlanta (48%).
    - LOT listees are especially likely to have visited LA in at some point in their lives (93%).
  - High levels of previous visitation in both nearby and remote markets may speak to LA's relatively broad appeal & visitation potential, as well as opportunities to encourage previous visitors to return
- Significant proximity effects noted for many aspects of awareness, familiarity, interest and visitation
  - Close-in markets have high levels of awareness, familiarity, and previous visitation, and thus represent key opportunities for first-time and repeat visitation, and ongoing cultivation by LOT.
  - More-distant markets have predictably lower levels of awareness/familiarity, but still significant levels of interest, and perhaps surprisingly high levels of previous visitation, possibly signaling latent visitation potential (for first-time and repeat visitors).

## 2. Perceptions of Louisiana

- Louisiana has strong positive associations with food, culture/people, New Orleans, music, and history
  - When asked what makes LA different and distinctive as a leisure travel destination, high numbers of panelists and LOT listees cite food (27%/44% respectively), culture (25%/30%), and to a lesser extent several other items (open-ended comments)
    - The frequent use of the word “people”, particularly by LOT listees (24%), may be worthy of further evaluation for possible LA marketing messages (particularly in association with friendliness and culture)
  - Additionally, in prompted ratings questions, most panelists (83-89%) have positive impressions of LA with regard to food, music, authentic experiences, historic/cultural attractions, vibrancy/energy, and unique experiences.
  - Positive perceptions are broadly shared across geographic markets
- Louisiana has some negative associations with safety/crime, heat/humidity, cleanliness, and roads, and some perceived limitations regarding family activities
  - These items are cited by a modest number of unprompted respondents (generally <10% each) as aspects they dislike about LA, or characteristics that would deter them from visiting
  - On a prompted basis, safety/security is a leading concern (only 34% somewhat/strongly agree LA is safe/secure). Additionally, only 54% agree LA has attractions for the whole family.
  - More distant markets (particularly Denver and to a lesser degree Chicago) understandably see LA as more difficult to get to than more proximate markets.

## 3. LOT advertising, website and logo

- Recall of tested advertisements is in 9-13% range
  - Among panelists, 13% had previously seen a tested LA video ad, 10% had seen a magazine ad, and 9% had seen an online ad
  - Among LOT listees, ad recall was in same range (video – 15%, magazine – 10%, online – 13%)
- Ad effectiveness is high
  - Panelists were especially likely to say that the video ad they viewed in the survey was effective or very effective in portraying LA as a place they would enjoy visiting for leisure reasons (77% average across ads tested). Ad effectiveness was lower for magazine ads (57%) and online ads (48%).
  - All four video ads had relatively similar effectiveness ratings.
  - Among the five magazine ads, “Hot Sauce for Your Ears” tested best with both panelists and LOT listees. “Come visit” and “Squeeze PineLeafBoys” each were seen as comparatively least effective.
  - Among the four executions of Oak Alley online advertisement, the horizontal 728x90 execution scored less well than the other three versions.
- LOT homepage is generally perceived positively
  - Prior visitation of the LOT website was 12% for panelists and a much higher 73% for LOT listees
  - Most panelists and LOT listees agree the design of the LOT webpage is appealing (72-80% respectively) and that the webpage increases their interest in Louisiana (55–71% respectively)

## 3. LOT advertising, website and logo (cont'd)

- Awareness of “Pick your Passion” slogan
  - Approximately 17% of panelists believe they’ve heard the slogan “Pick Your Passion,” although only 6% have both heard it and correctly associate it with LA.
    - Among panelists who have *not* heard the slogan, a modest 11% (9% of all net respondents) think it would be associated with LA.
    - Proximate markets are more likely to have heard and correctly identify the slogan with LA (Austin-10%, San Antonio-9%, Houston-7%) than Chicago (5%) and Atlanta (2%).
  - A much higher 31% of LOT listees have both heard the slogan and correctly associate it with LA.
- Reactions to “Pick your Passion” logo/slogan
  - Most panelists and LOT listees have favorable reasons to the logo, led by the way it captures the spirit/vitality/energy of LA (75-74% respectively), conveys something distinctive about LA (66-69%), and fits the way I think about LA (64-72%).
  - Lower shares agree the logo makes me think about LA in a more positive way (58-60%) and makes me want to visit LA (49-61%).
  - The most-liked aspects of the logo are its colors, exclamation points, aspects of the “Pick your Passion” slogan, simplicity, and font.
  - About half of panelists said there was nothing they particularly disliked about the logo. Among those with a dislike, leading dislikes were similar to the likes – exclamation points, aspects of the slogan, font and colors – indicating these items elicit the strongest reactions and are the predominant distinctive features of the logo.

## 4. Most recent Louisiana leisure trip in past two years

- Trip motivations and experiences
  - Cuisine was by far the most popular trip focus among both panelists and LOT listees, supporting an emphasis on cuisine in LOT marketing messages. Following were music/entertainment/nightlife, culture, history, and gaming.
  - About half of both panelists and listees last visited for a weekend getaway or vacation, with the remaining half coming for a variety of other reasons. Panelists were relatively more likely to be just passing through, while listees were more likely to have visited friends/family or attended an event.
- Information sources
  - Personal experience and friends/relatives were leading info sources for both Panelists and LOT listees, with the LOT website also widely used by LOT listees.
- Evaluation of Louisiana travel experience
  - Net promoter score: Panelists gave a relatively low NPS score with regards to likelihood to recommend LA as a travel destination to a friend or relative (16%), potentially an area of concern. LOT listees gave a much higher NPS score (67%).
  - The most commonly cited aspect of LA “liked best” was food. Music, gaming, New Orleans, fun, culture, and people were also widely mentioned, echoing themes elsewhere in the survey results.
  - Safety, cleanliness, roads, and humidity/heat were among the least-liked trip aspects, again echoing findings in other survey results.

## 5. Future travel to Louisiana

- Interest in experiences in a future trip to Louisiana
  - Mirroring other survey results, cuisine is by far the most popular as a desired experience, followed by music/entertainment/nightlife, culture, and history.
    - LOT listees express more interest than panelists on all items, further underscoring their enthusiasm for LA.
  - Affordability, ease of travel to Louisiana, and a perception that there's lots to do Louisiana are also leading drivers for respondents actually likely to visit LA in the next 12 months.
- Desired information about Louisiana for a future trip
  - Respondents express particular interest in knowing more about restaurants, lodging, sightseeing opportunities, deals/discounts, and areas of cultural or historic interest
    - Among respondents actually anticipating a visit in the next 12 months, LOT listees are much more likely than panelists to have engaged with LOT information sources (LOT website, e-newsletter, inspiration guide).
- Trip planning lead time
  - Both panelists and listees have a diversity of trip planning windows, with about half of each group expecting they would begin to plan <3 months and 3+ months in advance.
- Use of online devices before and during future trip to Louisiana
  - Both panelists and listees would be most likely to conduct pre-trip research using a personal/laptop computer (84-90% respectively). Lesser shares would use a tablet (32- 36%) or smartphone (27-36%).
  - About three-quarters of both groups would likely use a smartphone while traveling in LA (76-73%). About half would use a tablet (48-52%).
  - When traveling for leisure, both panelists and listees are especially likely to use mobile technologies for navigation (63-65%) and searching for info about activities/destinations (62-69%). About half use GPS features/location-aware apps (52-49%).
- Reasons for not visiting Louisiana in next 12 months
  - Leading deterrent is more interest in other destinations. Secondary reasons include "been there/done that," not enough vacation time, and personal reasons (health, financial, etc.), among others.

## 6. Concluding observations and recommendations

- Capitalize on comparatively strong top-of-mind awareness of and interest in Louisiana
  - In the target markets collectively, awareness of and interest in Louisiana rank below the top-tier US vacation states, but stand ahead of most other states. Results underscore the regional and to some degree national stature and recognition of Louisiana as an appealing destination.
  - Respondents' primary stated reason for not coming to Louisiana is a desire to visit other destinations, suggesting the challenges posed by the competition, and the essential marketing challenge of further increasing awareness and perceived appeal of Louisiana.
- Recognize potential of both first-time and repeat visitation markets
  - Previous visitation of Louisiana is quite high, both in close-by and more remote markets. There may be substantial potential in encouraging repeat visitation in both close and distant markets, in addition to attracting first-timers.
- Significant opportunities in both regional and more distant visitation markets
  - Regional markets in adjacent states clearly show high awareness of and propensity to travel to Louisiana, and should continue to be cultivated as critical, "core" markets.
  - There is considerable interest in Louisiana in more distant DMAs, suggesting potential to cultivate broader national markets as well, notwithstanding greater challenges posed by longer, more committing and expensive travel distances.
- Advertising samples and LOT homepage are generally well received, suggesting LOT is generally on the right track here. The tested video ads are especially effective.
  - "Pick your passion" logo/slogan are also generally well received, although perhaps there could be room for improvement in the degree to which they drive interest in visiting LA. The elements of the logo which are distinctive are clear (e.g. exclamation points, colors, wording, etc.); they are points of both likes and (to a lesser degree) dislikes.
  - LOT website & info resources are heavily used for trip planning by LOT listees, underscoring their importance.

## 6. Concluding observations and recommendations (cont'd)

- Continue to leverage strengths with regards to cuisine, music, culture, history; further emphasize people/friendliness?
  - Appeal of Louisiana's cuisine is especially broad – a near-unanimous draw.
  - Music, culture, history are also widely recognized and sought experiences. LA is also widely perceived as offering unique and authentic experiences.
  - The people of Louisiana, particularly their friendliness and culture, are commonly mentioned as a key strength by more experienced visitors – perhaps an underappreciated aspect of Louisiana that could be more broadly communicated?
  - New Orleans specifically appears to be the dominant draw within Louisiana and is clearly a critical part of the state's image. While New Orleans may be a key "selling point" to all types of visitors (particularly first timers), more experienced visitors indicate greater awareness of/affinity for other destinations within Louisiana, suggesting opportunities to convey the message that there's more to see in Louisiana beyond New Orleans.
  - Affordability, ease of travel to Louisiana, and a perception that there's lots to do Louisiana are also leading drivers for respondents likely to visit LA in the next 12 months. Special events and gaming are also important.
  - In addition to incorporating the above in marketing messages, information about the above items is also widely desired for trip planning purposes.
- Evaluate/address real or perceived shortcomings in the tourism product
  - Louisiana's net promoter score among previous visitors (independent panelists) is relatively low – potentially cause for concern/attention if corroborated by other research.
  - Safety, cleanliness, roads (e.g. maintenance/surface conditions), and heat/humidity are among actual or perceived weaknesses. Also lukewarm perception of variety of family activities.
- Continue to cultivate strong enthusiasm/goodwill for Louisiana among LOT listees
  - LOT listee survey respondents are to a large degree enthusiasts of Louisiana – avid visitors and appreciators of Louisiana. While the survey respondent profile may skew especially positive, it is likely indicative that LOT listees are among Louisiana's best customers and fans, with positive benefits both in terms of their own visitation and influence of others. Continuing to build e-newsletter lists and other engagement (e.g. social media) will be important.



# Outline

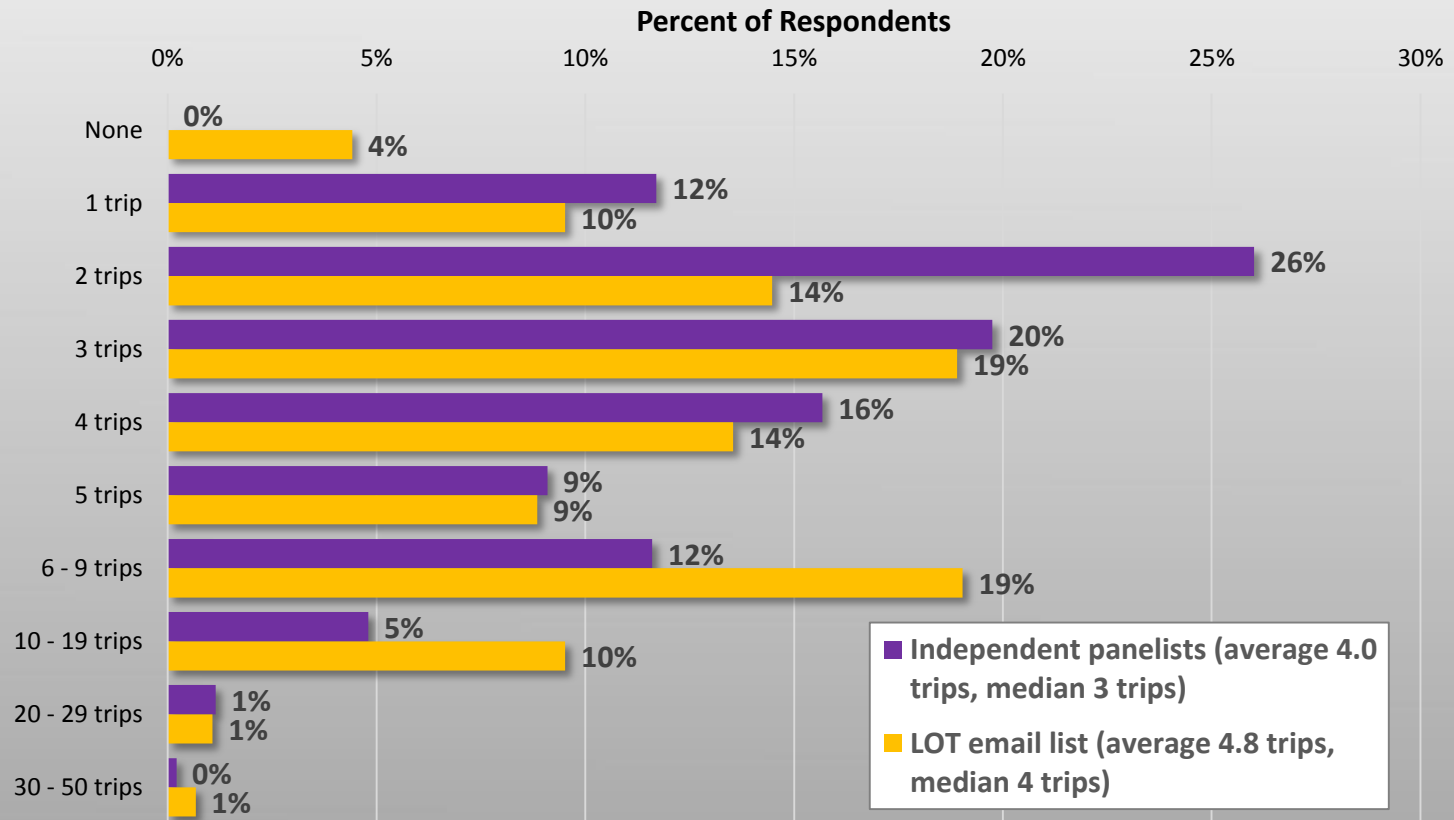
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# Respondent demographic profile

	Independent	LOT E-newsletter	Differential:		Independent	LOT E-newsletter	Differential:
	Panelists	Subscribers	Panelists vs. LOT list		Panelists	Subscribers	Panelists vs. LOT list
<b>Gender</b>				<b>Designated Market Area</b>			
Male	43%	40%	4%	Dallas - Fort Worth -- TX	13%	21%	-8%
Female	57%	60%	-4%	Chicago -- IL, IN	13%	9%	4%
				Houston -- TX	12%	15%	-3%
<b>Age</b>				Atlanta -- AL, GA, NC	12%	6%	7%
18 - 24	5%	0%	4%	Austin -- TX	11%	8%	3%
25 - 34	24%	2%	22%	Denver -- CO, MT, NE, NV, SD, WY	11%	4%	6%
35 - 44	19%	10%	9%	San Antonio -- TX	10%	8%	3%
45 - 54	19%	23%	-4%	Nashville -- KY, TN	10%	4%	6%
55 - 64	20%	33%	-14%	Memphis -- AR, MS, MO, TN	6%	4%	2%
65 - 74	13%	25%	-12%	All other DMAs	2%	22%	-20%
75 or older	0%	6%	-6%				
Average age	46.2	58.2	-12.1	<b>State</b>			
Median age	46.0	60.0	-14.0	Texas	46%	70%	-23%
				Tennessee	14%	6%	8%
<b>Marital / family status</b>				Illinois	13%	8%	5%
Single	15%	9%	6%	Georgia	12%	5%	7%
Single with children under age 18	3%	1%	2%	Colorado	10%	4%	6%
Married	48%	62%	-14%	Other states	5%	6%	-2%
Married with children under age 18	18%	10%	7%				
Domestic Partnership	5%	4%	1%	<b>Race / ethnicity</b>			
Divorced/Separated/Widowed	11%	12%	-1%	White/Caucasian	76%	85%	-9%
Other	0%	1%	-1%	Black/African-American	10%	7%	3%
				Hispanic/Latino	7%	4%	3%
<b>Annual HH income (before taxes)</b>				Asian/Pacific Islander	5%	1%	4%
Under \$35,000	0%	10%	-10%	Other	1%	1%	0%
\$35,000 - \$49,999	9%	14%	-5%	Two or more of the above	1%	3%	-1%
\$50,000 - \$74,999	30%	22%	8%				
\$75,000 - \$99,999	27%	21%	6%	<b>Education</b>			
\$100,000 - \$149,999	22%	20%	2%	Some high school or less	0%	1%	0%
\$150,000 - \$249,999	9%	10%	-1%	High school graduate	8%	11%	-4%
\$250,000 or above	3%	3%	0%	Attended some college	19%	27%	-9%
Interpolated median income	\$85,000	\$79,000	\$6,000	Associate's degree	9%	12%	-3%
				Bachelor's degree	37%	24%	14%
				Some graduate school or more	28%	26%	2%

Independent panelists are younger, more likely to be singles or with children, more affluent, more geographically diverse (less TX), more racially diverse, and more educated than LOT respondents. Both groups skew female. LOT respondents may skew old/female relative to all LOT listees.

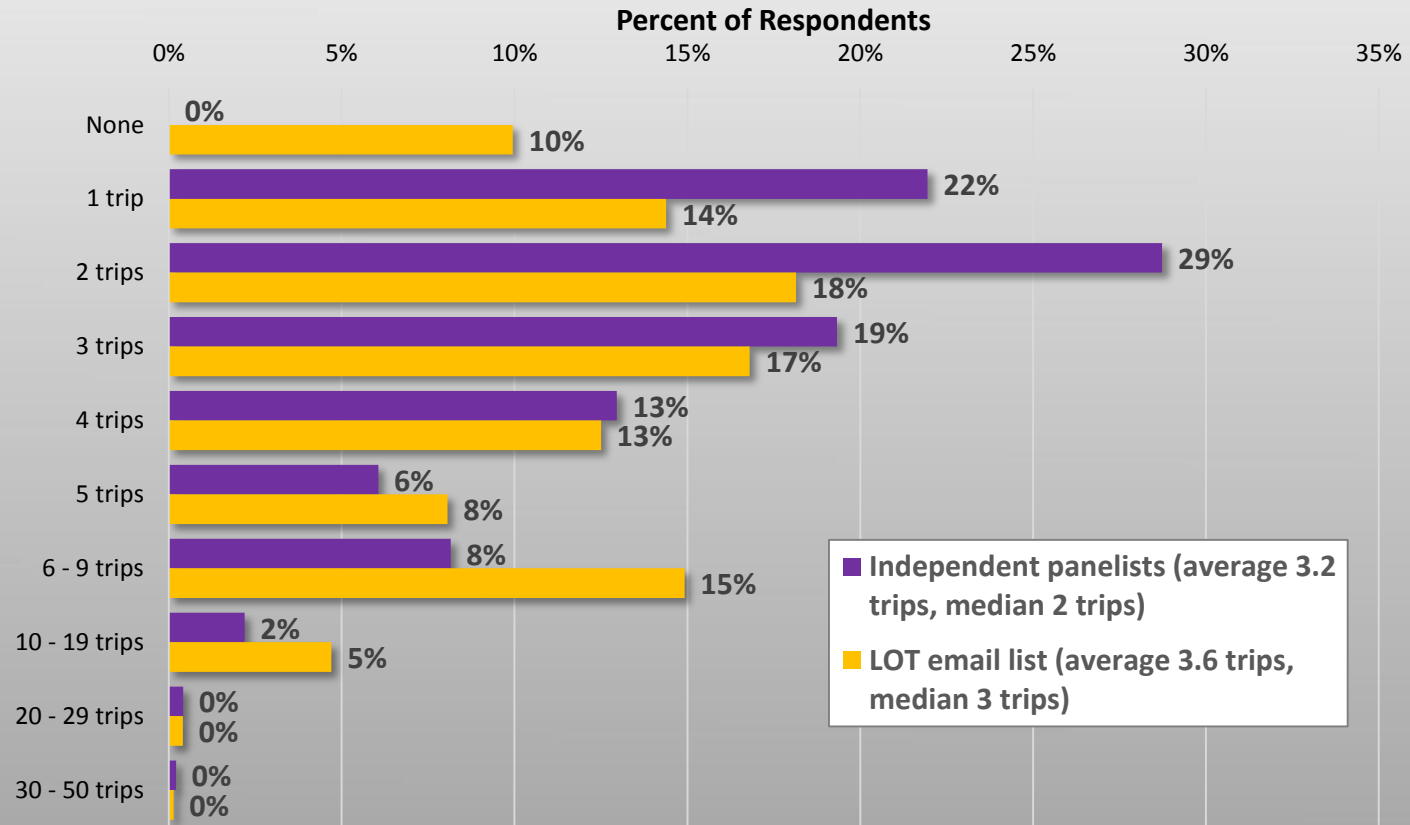
# Number of leisure trips taken in past year



Q6. In the past 12 months, how many leisure trips have you taken?

**Both groups travel substantially for leisure (average 4.0 – 4.8 trips/year), with LOT listees being somewhat more active. (Panelists were screened to take at least 1 leisure trip/year.)** 19

# Overnight leisure trips which included a paid lodging stay in past year



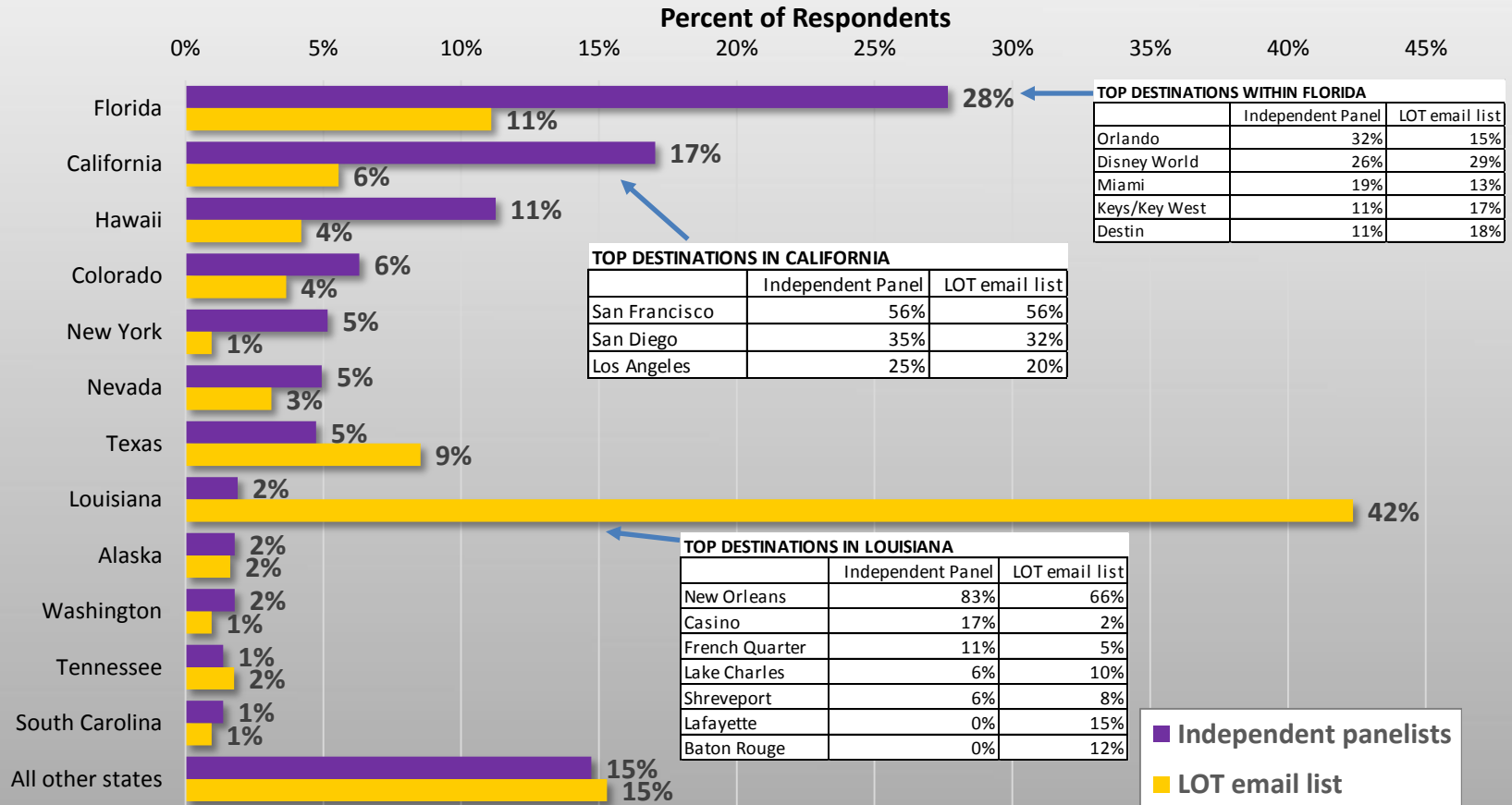
Q7. How many of these leisure trips have included an overnight stay in a hotel or other paid accommodations?

**Again, both groups take significant number of leisure trips which include paid lodging stays (average 3.2 – 3.6 trips/year), with LOT listees being somewhat more active. (Panelists were screened to take at least 1 leisure trip in paid lodging/year.)**

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# State which first comes to mind as an appealing travel destination



Q8. What U.S. state first comes to your mind as an appealing travel destination?

Q9. Are there specific places/destinations with that state that are particularly appealing to you?

*Among panelists, 2% cite LA – placing it 8<sup>th</sup> of 50 states, albeit well behind leaders FL (28%), CA (17%) & HI (11%). By contrast, among LOT listees, LA is the clear leader (42%), although responses may be biased by survey invitation coming from LOT. New Orleans is the dominant appealing destination within LA among both groups, although LOT listees indicate interest in a broader array of additional LA destinations – suggesting opportunities & challenges in marketing N.O. & other LA destinations.*

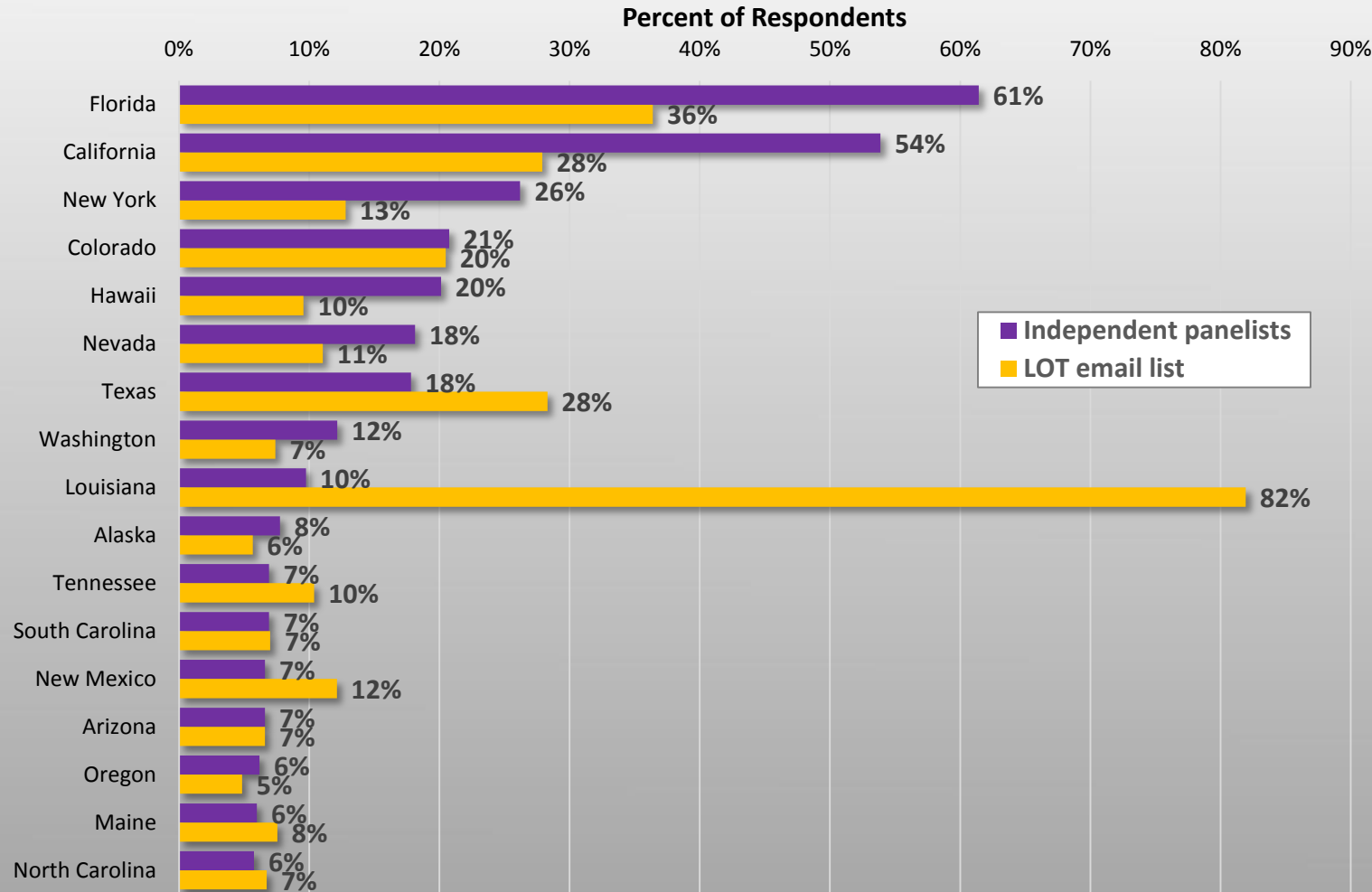
# State which first comes to mind as an appealing travel destination: by DMA (independent panelists)

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Florida	28%	15%	24%	46%	41%	37%	27%	20%	16%	25%	32%
California	17%	29%	14%	9%	14%	11%	13%	16%	27%	20%	20%
Hawaii	11%	17%	20%	5%	10%	5%	13%	6%	9%	13%	15%
Colorado	6%	11%	5%	3%			9%	8%	11%	8%	8%
New York	5%	2%	3%	7%	1%	9%	2%	9%	8%	6%	8%
Nevada	5%	7%	8%	4%	5%		6%	4%	3%	4%	5%
Texas	5%			2%		2%	10%	10%	9%	8%	8%
<b>LOUISIANA</b>	2%	1%	1%		1%	5%		4%	4%	3%	4%
Alaska	2%	3%	2%	1%	2%		2%	2%	2%	1%	2%
Washington	2%	2%	1%	2%	3%		1%	1%	5%	1%	4%
South Carolina	1%		2%	4%		4%		1%		2%	2%
Tennessee	1%		2%	3%	5%	4%		1%			4%
All others	15%	14%	18%	16%	16%	25%	17%	16%	7%	9%	18%

Q8. What U.S. state first comes to your mind as an appealing travel destination?

*Among independent panelists, FL and CA enjoy widespread interest across all DMAs, suggesting strong national stature and appeal. Top-of-mind selection of LA is strongest in Memphis, San Antonio, Austin & Houston (3 – 5%); 0-1% in other DMAs. Some proximity effects are apparent (e.g. Atlanta favoring FL, TX DMAs favoring TX, etc.)*

# States which first come to mind as appealing travel destinations (first state plus up to 3 other states)



Q10. What states first come to your mind as appealing travel destinations? (First state and up to three other states)

**Among panelists, 10% cite LA among top four states – ranking it 9<sup>th</sup> of 50 states. FL (61%) and CA (54%) are the dominant leaders, followed by NY (26%), CO (21%), HI (20%), NV (18%), and TX (18%). By contrast, among LOT listees, LA is the dominant leader (82%) – an indicator of strong enthusiasm, although again likely somewhat overstated. FL (36%), CA (28%) and TX (28%) follow.**



# States which first come to mind as an appealing travel destinations (up to 4 states) – by DMA (indep. panelists)

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Florida	61%	55%	61%	79%	70%	78%	58%	58%	45%	56%	35%
California	54%	63%	59%	45%	45%	29%	58%	44%	70%	58%	41%
New York	26%	19%	20%	38%	16%	21%	32%	28%	27%	30%	22%
Colorado	21%	22%	20%	15%	12%	5%	25%	23%	31%	25%	26%
Hawaii	20%	29%	26%	13%	16%	12%	23%	14%	19%	25%	17%
Nevada	18%	19%	23%	17%	18%	16%	18%	19%	16%	16%	7%
Texas	18%	9%	8%	13%	12%	22%	28%	28%	19%	24%	20%
Washington	12%	21%	8%	7%	9%	5%	12%	15%	21%	9%	16%
Louisiana	10%	7%	4%	4%	9%	12%	9%	13%	18%	14%	14%
Alaska	8%	9%	9%	7%	7%	5%	10%	6%	5%	9%	5%
South Carolina	7%	1%	7%	16%	11%	7%	6%	5%		6%	15%
Tennessee	7%		5%	16%	14%	21%	1%	5%	5%	5%	20%
Arizona	7%	7%	13%	3%	9%		4%	6%	5%	10%	9%
New Mexico	7%	9%	3%	2%	3%	3%	9%	13%	9%	8%	12%
Oregon	6%	16%	6%	1%	4%	2%	4%	7%	13%	4%	15%
Maine	6%	5%	4%	9%	5%	3%	5%	5%	10%	5%	6%
North Carolina	6%	5%	6%	17%	7%	3%	6%	3%	3%	3%	14%

Q10. What states, if any, first come to your mind as appealing travel destinations? (First state and up to three other states)

**Louisiana generally enjoys higher recognition in more proximate markets (Austin-18%, Houston-14%, San Antonio-12%) than more distant markets (Denver-7%, Chicago-4%, Atlanta-4%). Nashville & Dallas intermediate at 9%. Proximity effects are also apparent for many other state destinations.**

# Awareness of the slogan "Pick Your Passion"

	List Source		Independent Panelists										
	Panelists	LOT emails	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range	
Have you seen or heard the slogan, 'Pick Your Passion' in any travel or tourism related advertising?													
Yes	17%	34%	16%	17%	13%	22%	16%	15%	16%	16%	17%	9%	
No	83%	66%	84%	83%	87%	78%	84%	85%	84%	84%	83%	9%	
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	0%	
(If have seen the slogan 'Pick Your Passion')													
Which state is associated with the slogan 'Pick Your Passion' for travel and tourism?													
LOUISIANA	6%	31%	6%	5%	2%	6%	7%	6%	9%	10%	7%	8%	
California	3%	0%	4%	3%	2%	1%	5%	2%	4%	2%	3%	4%	
Florida	2%	0%	1%	3%	3%	2%	2%	2%		2%	3%	2%	
All other states	5%	3%	5%	7%	6%	12%	2%	5%	3%	2%	5%	10%	
Total	17%	34%	16%	17%	13%	22%	16%	15%	16%	16%	17%	9%	
(If have not seen the slogan 'Pick Your Passion')													
Which state would you think is associated with the slogan 'Pick Your Passion' for travel and tourism?													
California	14%	3%	22%	15%	12%	9%	5%	13%	10%	17%	15%	17%	
Florida	10%	5%	8%	8%	15%	9%	12%	8%	10%	8%	12%	7%	
LOUISIANA	9%	35%	10%	8%	5%	10%	10%	12%	12%	11%	7%	7%	
All other states	51%	31%	45%	52%	55%	51%	57%	52%	51%	49%	50%	12%	
Total	83%	66%	84%	83%	87%	78%	84%	85%	84%	84%	83%	9%	
Total: associate Louisiana with 'Pick Your Passion':													
LOUISIANA (sum)	15%	65%	16%	13%	7%	16%	17%	18%	21%	21%	14%	15%	

Q11. Have you seen or heard the slogan, 'Pick Your Passion' in any travel or tourism related advertising?

Q13a. (If have seen the slogan 'Pick Your Passion') Which state is associated with the slogan 'Pick Your Passion' for travel and tourism?

Q13b. (If have not seen the slogan 'Pick Your Passion') Which state would you think is associated with the slogan 'Pick Your Passion' for travel and tourism?

Approximately 17% of panelists believe they've heard the slogan "Pick Your Passion," although only 6% have both heard it & correctly associate it with LA. Proximate markets are more likely to correctly identify LA (Austin-10%, San Antonio-9%, Houston-7%) than Chicago (5%) and Atlanta (2%). Among panelists who have not heard the slogan, a modest 11% (9% of all net respondents) think it would be associated with LA. A much higher 31% of LOT listees have both heard the slogan and correctly associate it with LA.

# Awareness of state travel advertising (unaided)

	List Source		Independent Panelists										DMA range
	Panelists	LOT emails	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston		
Florida	36%	29%	16%	22%	59%	59%	38%	32%	32%	31%	40%		43%
Texas	24%	42%	7%	9%	10%	16%	28%	27%	46%	34%	43%		39%
California	21%	15%	30%	14%	16%	12%	3%	24%	27%	27%	27%		27%
Michigan	19%	17%	16%	45%	16%	12%	7%	10%	25%	18%	10%		38%
Louisiana	14%	67%	9%	6%	4%	18%	17%	13%	27%	27%	17%		23%
Nevada	13%	7%	17%	6%	12%	12%	10%	13%	14%	6%	25%		20%
Tennessee	10%	8%	1%	7%	34%	22%	10%	8%	4%	2%	3%		32%
Arkansas	9%	17%	1%			2%	21%	28%	4%	21%	8%		27%
Colorado	9%	15%	14%	8%		2%	3%	13%	9%	5%	17%		15%
Wyoming	8%	6%	43%	15%	1%	2%			2%				42%
Missouri	8%	7%		16%		18%	38%	13%					25%
Oklahoma	8%	15%						26%	4%	26%	10%		22%
Illinois	7%	4%	1%	34%	3%	4%			2%	2%			33%
Wisconsin	6%	6%		34%	3%		3%	1%			3%		33%
New York	6%	5%	9%	2%	9%	2%		3%	5%	3%	10%		7%

Q12. (If have seen state travel advertising) For which states have you seen, heard and/or experienced travel and tourism related advertising in the past 2 months?

**Among panelists, LA is the fifth-most recalled state for tourism advertising (14%), behind FL (36%), TX (24%), CA (21%) and MI (19%). Recall of LA advertising is highest in San Antonio (27%) and Austin (27%), and lowest in Atlanta (4%), Chicago (6%) and Denver (9%). Strong proximity effects are apparent, with DMOs clearly targeting nearby states. By comparison, LA advertising is recalled by fully 67% of LOT listees, making LA the dominant leader (although again results might be overstated due to survey invite from LOT).**

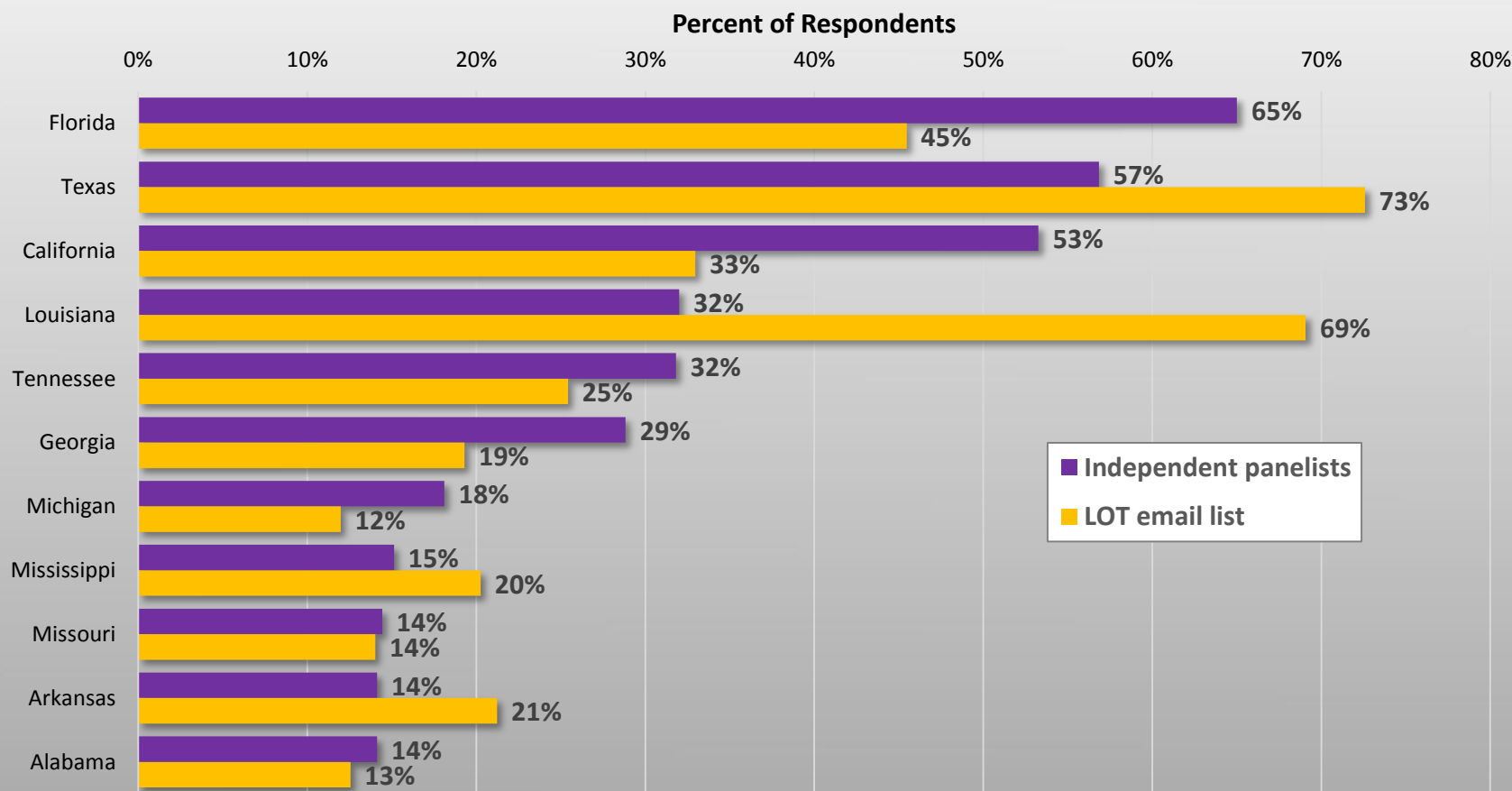
# Awareness of state travel advertising (aided)

	<u>List Source:</u>		<u>Indep. Panelists</u>												
	<u>Aided Recall</u>		Unaided	Aided vs.	<u>Independent Panelists - Aided Recall (by DMA)</u>										
	Panelists	LOT emails	Recall	Unaided	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range	
Florida	37%	45%	36%	2%	24%	35%	59%	51%	28%	38%	37%	27%	32%	36%	
Texas	28%	56%	24%	4%	16%	18%	16%	20%	19%	33%	51%	43%	36%	36%	
California	26%	24%	21%	5%	34%	26%	19%	20%	9%	26%	35%	25%	30%	26%	
Louisiana	24%	72%	14%	10%	15%	20%	12%	19%	21%	23%	34%	45%	31%	32%	
Michigan	21%	25%	19%	2%	19%	55%	16%	13%	11%	14%	18%	16%	15%	44%	
Tennessee	16%	21%	10%	7%		14%	40%	42%	23%	14%	7%	6%	7%	36%	
Arkansas	12%	35%	9%	4%	4%	4%	2%	8%	19%	33%	8%	25%	12%	31%	
Missouri	11%	14%	8%	3%	3%	28%	3%	17%	28%	10%	4%	4%	4%	25%	
Mississippi	8%	22%	3%	5%	2%	10%	7%	14%	14%	3%	7%	9%	9%	12%	
Georgia	8%	11%	3%	4%	2%	3%	25%	18%	5%	2%	5%	4%	4%	23%	
Alabama	7%	16%	4%	3%	2%	5%	9%	19%	16%		4%	8%	3%	17%	
None of these	27%	8%	n/a	n/a	42%	18%	20%	26%	30%	29%	23%	27%	32%	24%	

Q13. You may have already mentioned one or more of these states in the previous question, but for which of these states have you seen travel and tourism related advertising in the past 2 months?

*Among panelists, aided recall of travel advertising jumps 10ppts for LA (from 14% unaided to 24% aided), a bigger increase than for other studied states (2-7%, average 4%). This may indicate opportunities to enhance frequency/impact of LA advertising to enhance 'memorability'. Aided recall of LA is highest in Austin (45%), San Antonio (34%), and Houston (31%); intermediate in Dallas (23%), Memphis (21%), Chicago (20%) and Nashville (19%); and lowest in Denver (15%) and Atlanta (12%).*

# Familiarity with states as leisure travel destinations (top 2 box)



Q14. How familiar are you with the following states as places to visit for leisure travel?

(Percent responding 4 or 5, on 1-5 scale where 1=not at all familiar, 3=moderately familiar, and 5=very familiar)

**About 32% of independent panelists and 69% of LOT listees consider themselves familiar with LA as a travel destination. Among panelists, familiarity with LA lags behind FL (65%), TX (57%), and CA (53%), but is similar to TN (32%), and ahead of GA (29%), MI (18%), MS (15%), MO (14%), AR (14%) and AL (14%).**

# Familiarity with states as leisure travel destinations: Independent Panelists by DMA (top two box)

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Florida	65%	65%	71%	83%	58%	69%	58%	56%	53%	69%	31%
Texas	57%	34%	27%	25%	21%	20%	88%	89%	92%	93%	73%
California	53%	66%	57%	44%	39%	31%	56%	50%	62%	65%	35%
Louisiana	32%	17%	18%	31%	21%	38%	34%	34%	36%	56%	39%
Tennessee	32%	11%	23%	42%	87%	78%	19%	15%	14%	24%	76%
Georgia	29%	8%	18%	89%	44%	28%	19%	20%	11%	18%	81%
Michigan	18%	16%	48%	14%	21%	9%	13%	12%	14%	7%	41%
Mississippi	15%	7%	9%	12%	14%	53%	16%	13%	6%	20%	47%
Missouri	14%	8%	23%	10%	9%	28%	20%	11%	5%	13%	23%
Alabama	14%	5%	7%	27%	18%	22%	16%	12%	6%	13%	21%
Arkansas	14%	8%	9%	7%	8%	43%	22%	12%	10%	16%	36%

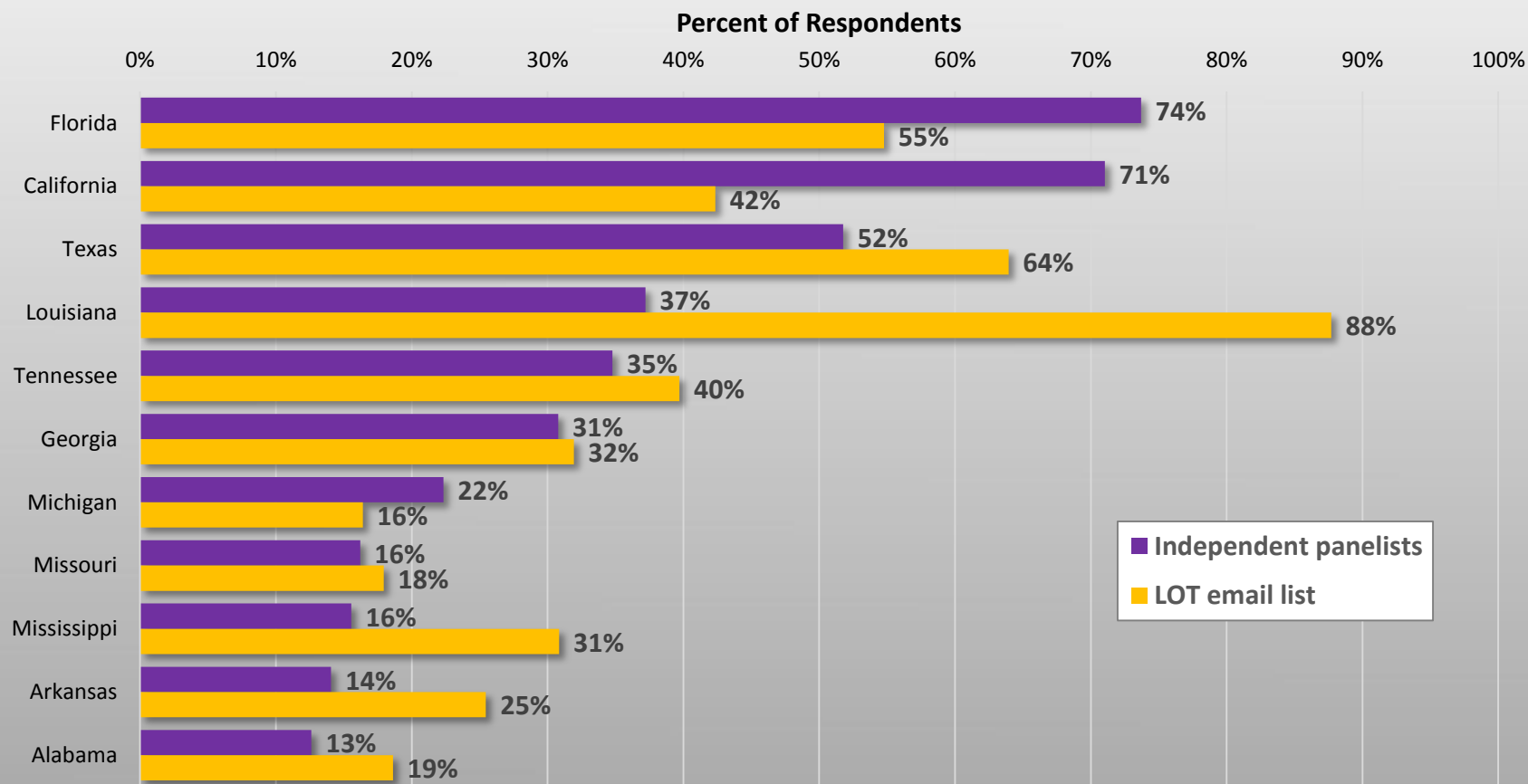
Q14. How familiar are you with the following states as places to visit for leisure travel?

(Percent responding 4 or 5, on 1-5 scale where 1=not at all familiar, 3=moderately familiar, and 5=very familiar)

**Among independent panelists, familiarity with LA is highest in Houston (56%), and progressively lower in Memphis (38%), Austin (36%), Dallas and San Antonio (34% each), Atlanta (31%), Nashville (21%), Chicago (18%), and Denver (17%). Proximity effects are apparent in many in-state and adjacent-state visitation patterns.**



# Interest in states as leisure travel destinations (top 2 box)



Q15. How interested are you in each of the following states as places to visit for leisure travel?

(Percent responding 4 or 5, on 1-5 scale where 1=not at all interested, 3=moderately interested, and 5=very interested)

**About 37% of independent panelists and 88% of LOT listees are interested in LA as a travel destination. Among panelists, interest in LA lags behind FL (74%), CA (71%), and TX (52%), but is ahead of TN (35%), GA (31%), MI (22%), MO (16%), MS (16%), AR (14%) and AL (13%).**

# Interest in states as leisure travel destinations: Independent Panelists by DMA (top 2 box)

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Florida	74%	67%	77%	81%	68%	81%	76%	71%	69%	74%	14%
California	71%	81%	85%	69%	54%	55%	70%	62%	72%	78%	32%
Texas	52%	30%	41%	40%	35%	40%	63%	73%	65%	70%	42%
Louisiana	37%	29%	30%	39%	39%	47%	38%	37%	41%	43%	18%
Tennessee	35%	18%	36%	44%	51%	49%	31%	29%	25%	39%	33%
Georgia	31%	14%	24%	55%	43%	44%	28%	25%	19%	30%	41%
Michigan	22%	18%	50%	19%	21%	13%	24%	13%	16%	20%	38%
Missouri	16%	4%	17%	14%	15%	42%	23%	12%	9%	17%	37%
Mississippi	16%	11%	11%	16%	16%	31%	18%	16%	7%	20%	24%
Arkansas	14%	8%	12%	9%	10%	25%	22%	16%	9%	16%	17%
Alabama	13%	10%	6%	14%	20%	30%	11%	8%	5%	17%	25%

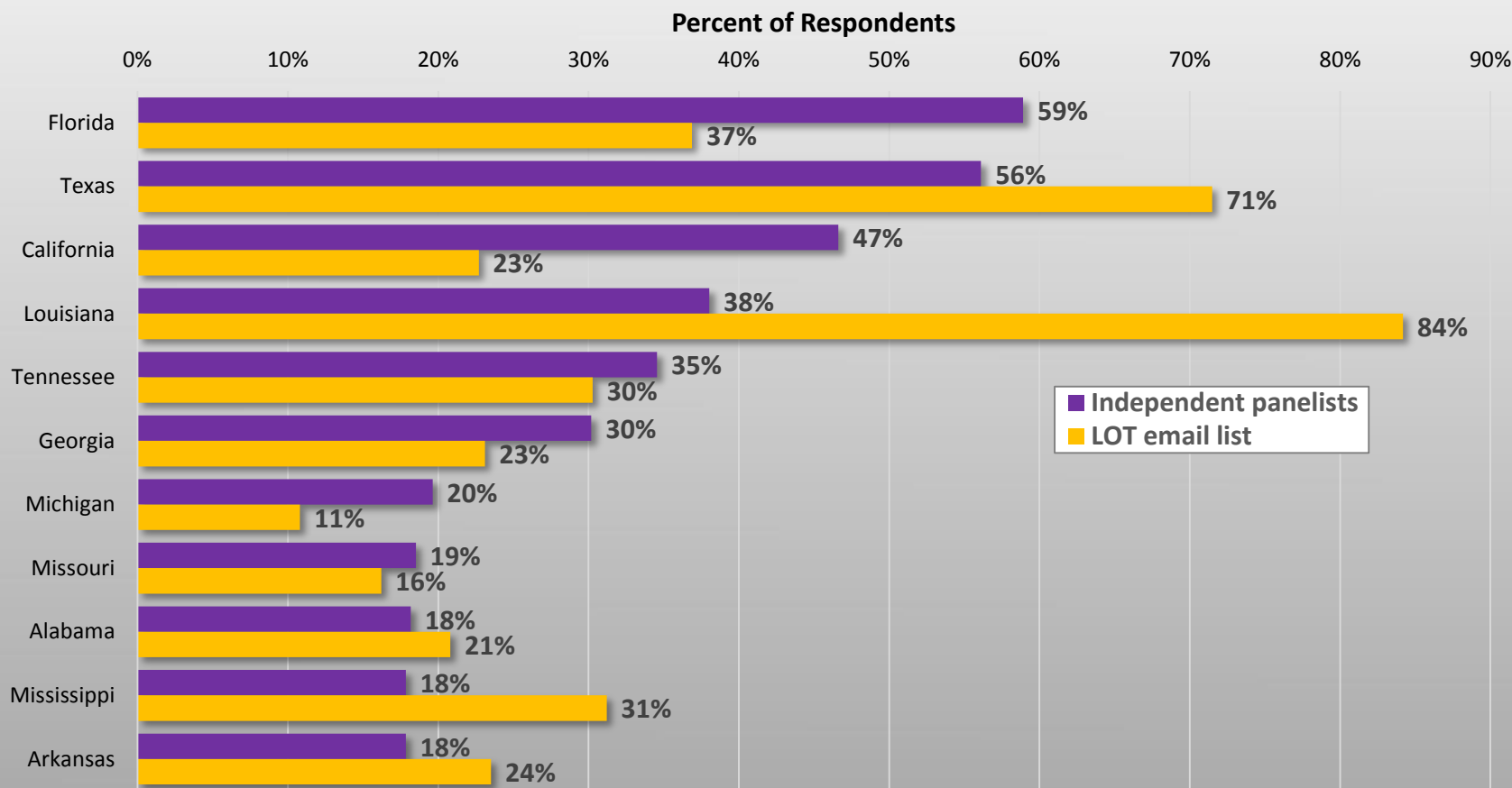
Q15. How interested are you in each of the following states as places to visit for leisure travel?

(Percent responding 4 or 5, on 1-5 scale where 1=not at all interested, 3=moderately interested, and 5=very interested)

**Among Panelists, interest in LA as a travel destination varies from 29% to 47% across DMAs, with the highest interest in Memphis (47%), lowest interest in Denver (29%) and Chicago (30%), and intermediate interest in other DMAs (37 – 43%). FL and CA enjoy high interest across all DMAs, while most other tested states exhibit proximity effects.**



# Likelihood of travel in states for leisure in next 12 months (top 3 boxes)



Q16. How likely you are to travel to or within each of the following states for leisure in the next 12 months?

(% responding 4, 5 or 6, on 1-6 scale where 1=very unlikely, 2=unlikely, 3=neutral/neither likely or unlikely, 4=likely, 5=very likely, and 6=will certainly visit)

**About 38% of independent panelists and 84% of LOT listees say they are likely to travel to LA for leisure in the next 12 months. Among panelists, likely visitation of LA lags behind FL (59%), TX (56%), and CA (47%), but is ahead of TN (35%), GA (30%), MI (20%), MO (19%), and AL, MS and AR (18% each).**

# Likelihood of travel in states for leisure in next 12 months: Independent Panelists by DMA (top boxes)

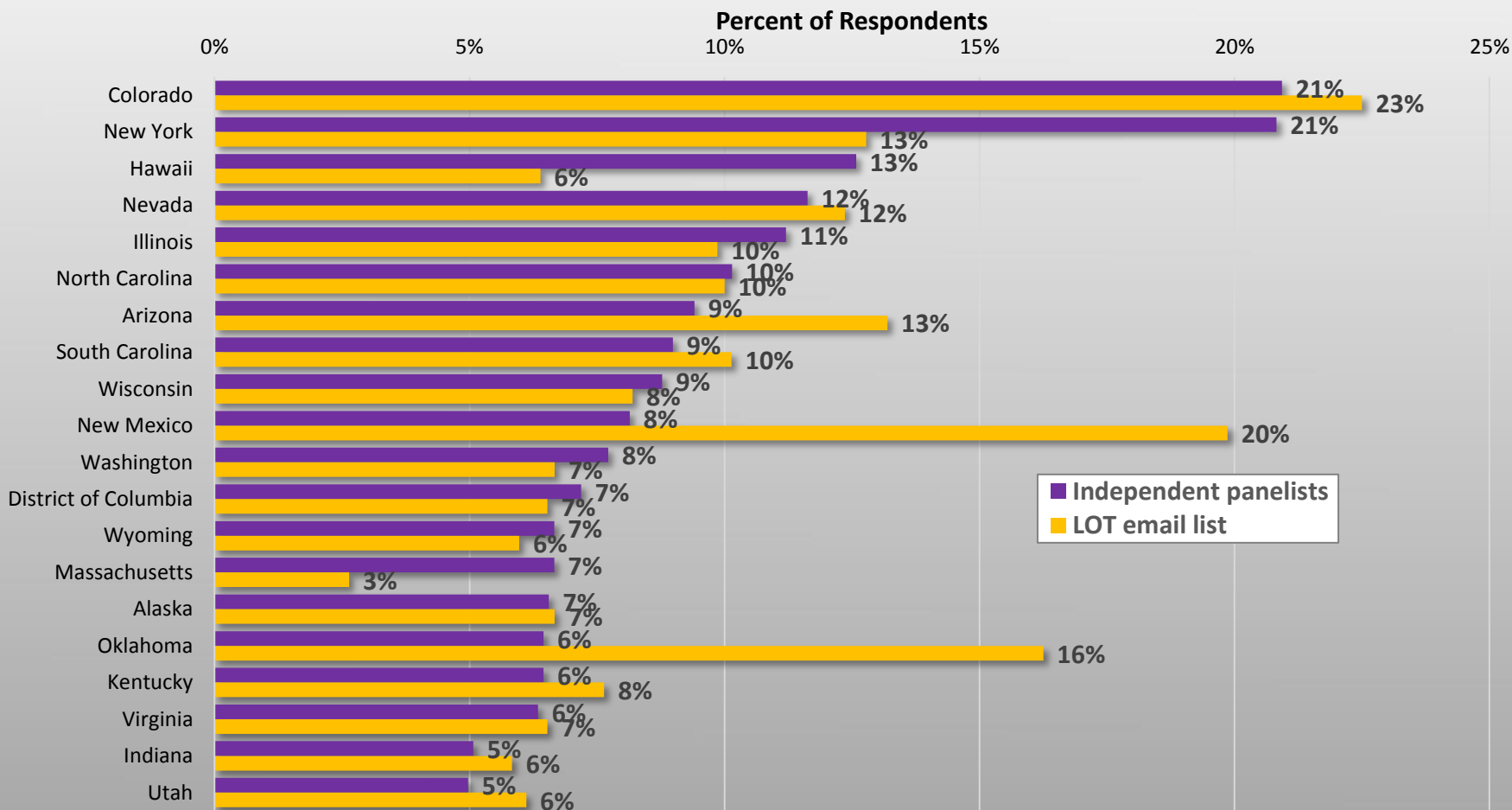
	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Florida	59%	47%	61%	84%	59%	57%	49%	54%	53%	61%	37%
Texas	56%	26%	33%	36%	18%	27%	84%	93%	81%	89%	75%
California	47%	61%	57%	41%	35%	14%	41%	51%	58%	47%	47%
Louisiana	38%	24%	32%	40%	24%	38%	39%	40%	41%	59%	35%
Tennessee	35%	15%	32%	50%	81%	73%	22%	17%	16%	24%	66%
Georgia	30%	14%	23%	77%	48%	27%	18%	20%	16%	21%	63%
Michigan	20%	15%	52%	17%	14%	11%	18%	14%	13%	12%	42%
Missouri	19%	15%	24%	13%	16%	39%	27%	15%	9%	12%	31%
Alabama	18%	9%	14%	32%	23%	29%	18%	9%	10%	18%	23%
Mississippi	18%	10%	14%	18%	18%	48%	15%	17%	13%	17%	38%
Arkansas	18%	7%	17%	13%	14%	39%	30%	16%	11%	17%	32%

Q16. How likely you are to travel to or within each of the following states for leisure in the next 12 months?

(% responding 4, 5 or 6, on 1-6 scale where 1=very unlikely, 2=unlikely, 3=neutral/neither likely or unlikely, 4=likely, 5=very likely, and 6=will certainly visit)

**Among Panelists, likelihood of visiting LA is highest among respondents in Houston (59%); intermediate in Austin (41%), San Antonio (40%), Atlanta (40%), Dallas (39%), and Memphis (38%); and lowest in Chicago (32%), Nashville (24%) and Denver (24%). As always, DMA results should be interpreted with caution due to modest sample sizes.**

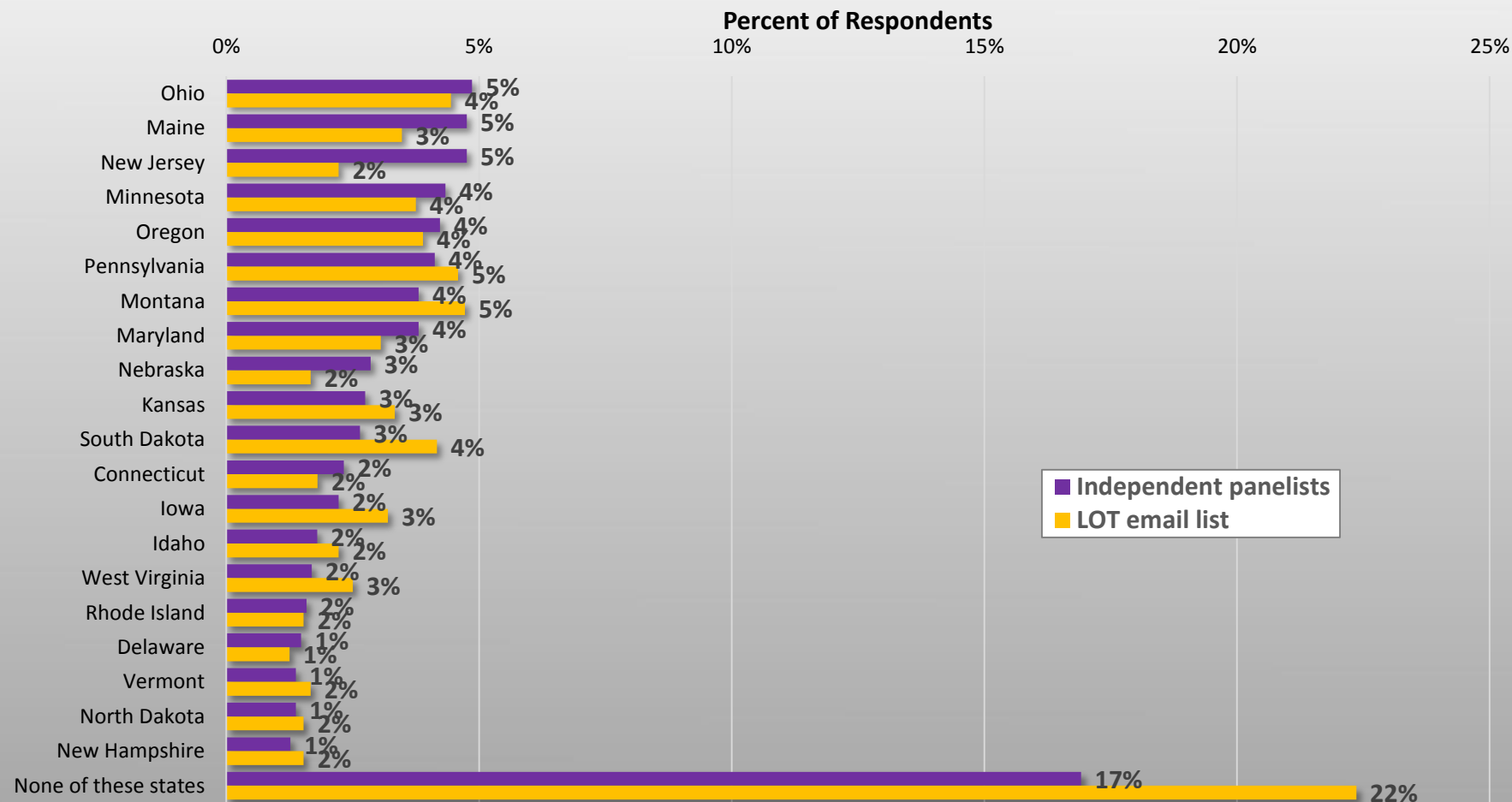
# Other states likely/certain to visit on leisure trip in next 12 months (Top 20)



Q17. Which other states, if any, are you likely or certain to travel to or within for leisure reasons in the next 12 months?

**Other than comp set states, CO (21%) and NY (21%) are the two leading states for likely visits in next 12 months. LOT listees show affinity for NM (20%) and OK (16%), likely due to strong share of TX residents.**

# Other states likely/certain to visit on leisure trip in next 12 months (Bottom 20)



Q17. Which other states, if any, are you likely or certain to travel to or within for leisure reasons in the next 12 months?

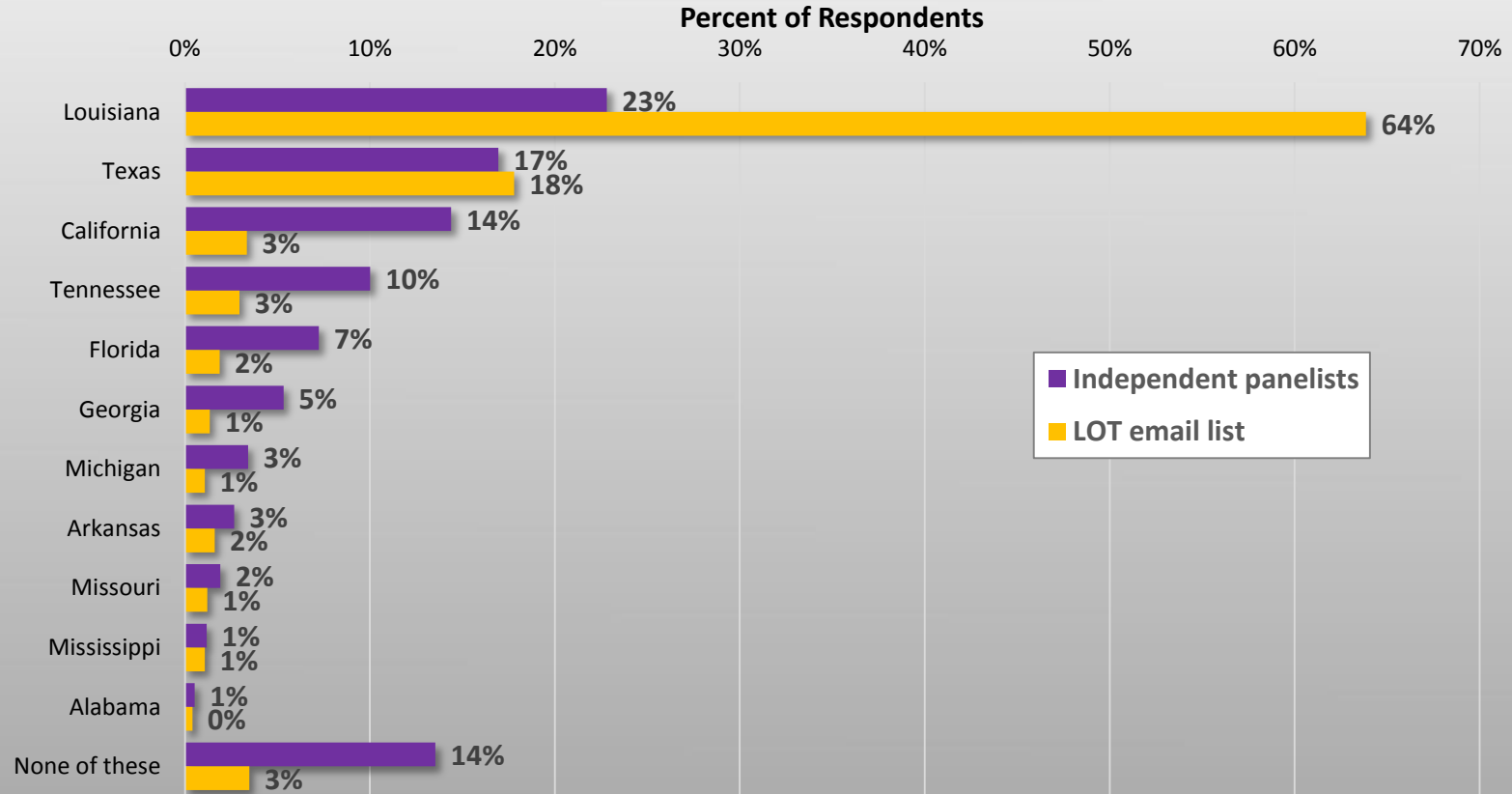
# Likelihood of travel in other states for leisure in next 12 months: Independent Panelists by DMA

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Colorado	21%	58%	15%	9%	7%	5%	20%	21%	27%	21%	53%
New York	21%	17%	18%	26%	11%	17%	19%	20%	30%	26%	19%
Hawaii	13%	16%	12%	11%	7%	10%	11%	10%	17%	17%	11%
Nevada	12%	18%	10%	7%	7%	3%	13%	18%	9%	14%	15%
Illinois	11%	3%	36%	7%	12%	14%	9%	6%	7%	5%	33%
North Carolina	10%	7%	7%	30%	14%	9%	5%	4%	7%	8%	25%
Arizona	9%	14%	15%	3%	5%	5%	9%	15%	8%	10%	13%
South Carolina	9%	5%	6%	31%	11%	14%	3%	2%	5%	4%	29%
Wisconsin	9%	2%	48%	3%	3%	3%	4%	2%	4%	2%	47%
New Mexico	8%	14%	4%	3%	1%	3%	9%	16%	14%	7%	15%
Washington	8%	11%	10%	4%	3%		8%	11%	12%	6%	9%
District of Columbia	7%	3%	5%	10%	8%	9%	4%	10%	6%	11%	8%
Massachusetts	7%	8%	7%	6%	7%	5%	4%	8%	10%	6%	6%
Wyoming	7%	28%	4%	4%	4%		2%	6%	6%	4%	26%
Alaska	7%	9%	6%	1%	4%	7%	6%	8%	8%	10%	9%

Q17. Which other states, if any, are you likely or certain to travel to or within for leisure reasons in the next 12 months?

*Proximity effects are apparent in the respective markets' likely travel destinations (e.g. Denver residents to CO and WY, Chicago to IL and WI, etc.).*

# State that best fits description statement



Q18. State which best fits the description 'offers travelers an experience in which you can easily connect with the local life and culture, access great food & dining, shopping, the outdoors, history, art, theater & music, and is authentic in feeling'?

**Among Panelists, LA ranks first as the state which best fits the description (23%), followed by TX (17%) and CA (14%). LOT listees predominantly select LA (64%), and secondarily TX (18%).**

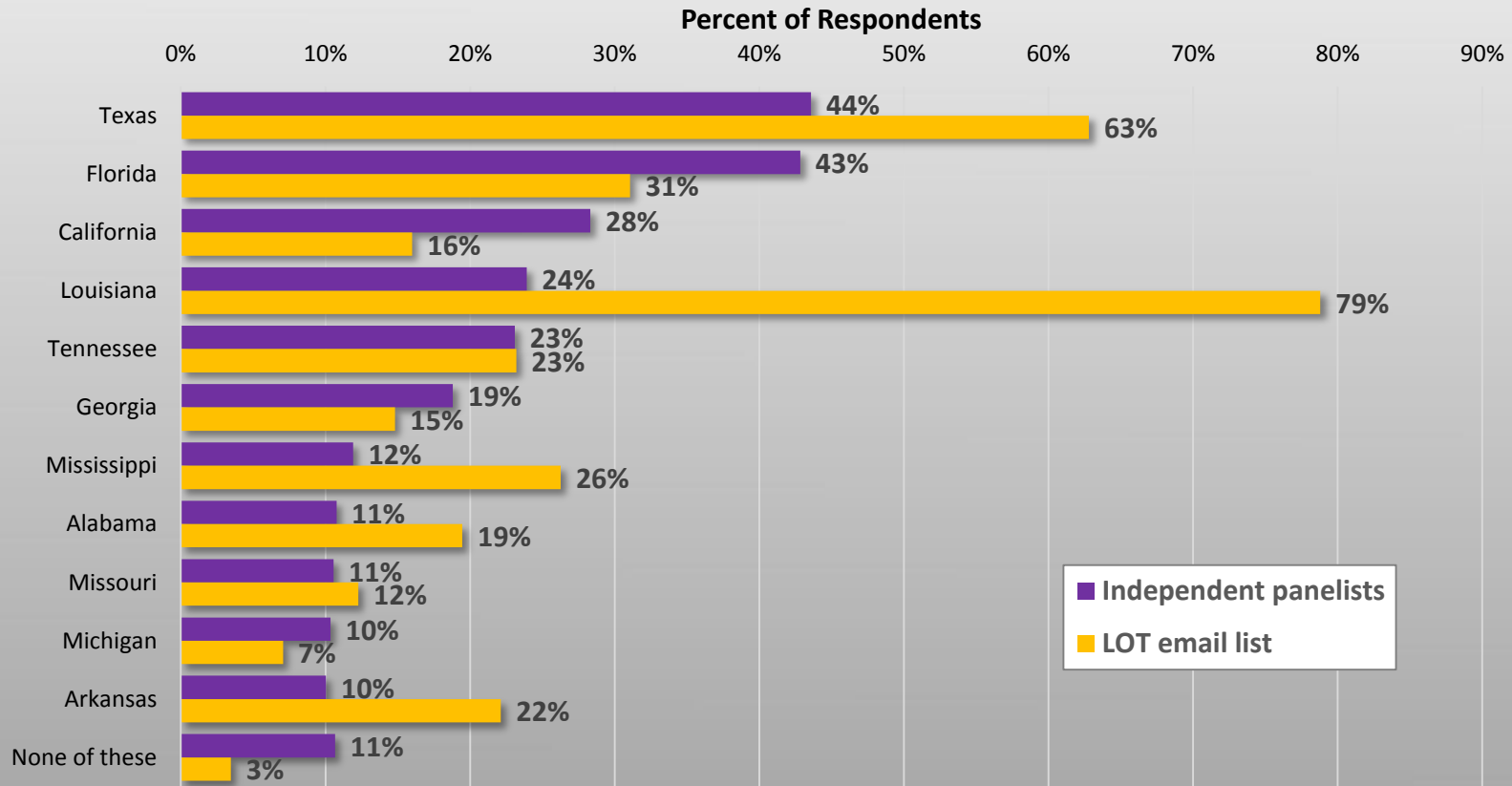
# State that best fits description statement: Independent Panelists by DMA

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Louisiana	23%	23%	15%	20%	22%	23%	24%	24%	34%	23%	20%
Texas	17%	12%	6%	6%	7%	9%	20%	39%	28%	26%	33%
California	14%	31%	22%	11%	5%	7%	9%	7%	12%	17%	25%
None of these	14%	15%	15%	15%	13%	23%	12%	10%	9%	13%	14%
Tennessee	10%	3%	8%	17%	27%	11%	12%	4%	6%	6%	24%
Florida	7%	3%	11%	10%	8%	7%	10%	8%	4%	3%	8%
Georgia	5%	7%	3%	14%	8%	5%	2%	2%	2%	6%	12%
Michigan	3%	1%	11%	1%	3%		4%	2%	2%	2%	10%
Arkansas	3%	3%	2%	2%	1%	9%	6%	1%		3%	8%
Missouri	2%	1%	4%	4%	4%		2%	1%	1%		3%
Mississippi	1%	1%	2%	2%	2%	4%		1%	1%		3%
Alabama	1%	1%	1%			4%					3%

Q18. Which of these states do you feel best fits the description “offers travelers an experience in which you can easily connect with the local life and culture, access great food & dining, shopping, the outdoors, history, art, theater & music, and is authentic in feeling”?

**Among Panelists, the percentage selecting LA is highest in Austin (34%), lowest in Chicago (15%), and intermediate in the other seven DMAs (a relatively consistent 20 – 24%).**

# States visited for leisure in past 2 years



Q19. In the past two years, which of these states (if any) have you traveled to or within for purely leisure reasons?

**Almost one-quarter of Panelists (24%) and 8 in 10 LOT listees (79%) have visited LA for leisure in the past two years. Among Panelists, visitation of LA lagged behind TX (44%), FL (43%), and CA (28%), but outpaced TN (23%), GA (19%), MS (12%), AL (11%), MO (11%), MI (10%), and AR (10%).**



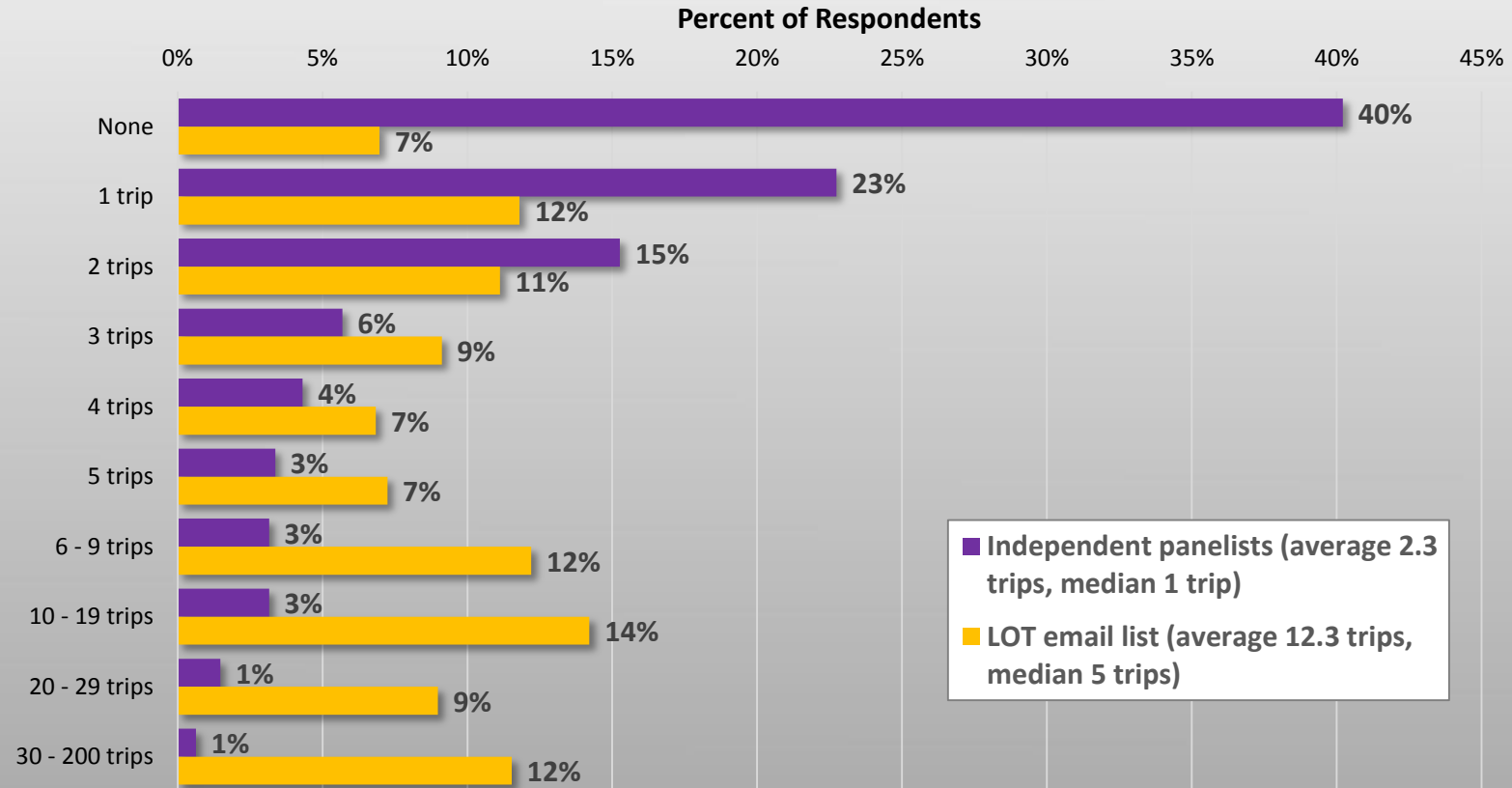
# States visited for leisure in past 2 years: Independent Panelists by DMA

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Texas	44%	22%	17%	11%	19%	14%	69%	77%	74%	77%	66%
Florida	43%	29%	52%	66%	47%	47%	34%	33%	31%	47%	37%
California	28%	44%	35%	11%	17%	7%	31%	31%	36%	31%	37%
Louisiana	24%	13%	13%	11%	17%	21%	28%	27%	35%	51%	40%
Tennessee	23%	6%	16%	35%	70%	66%	11%	11%	9%	10%	64%
Georgia	19%	6%	10%	62%	40%	22%	7%	9%	7%	8%	56%
Mississippi	12%	4%	5%	8%	19%	47%	10%	5%	13%	14%	43%
Alabama	11%	3%	5%	18%	26%	24%	8%	5%	9%	8%	23%
None of these	11%	26%	13%	9%	6%	5%	10%	9%	11%	6%	21%
Missouri	11%	7%	19%	4%	9%	29%	11%	8%	8%	6%	25%
Michigan	10%	7%	37%	4%	9%	7%	6%	4%	6%	3%	33%
Arkansas	10%	3%	3%	3%	10%	31%	23%	6%	11%	8%	28%

Q19. In the past two years, which of these states (if any) have you traveled to or within for purely leisure reasons?

**Among Panelists, the percentage who have visited LA in the past two years is by far highest in Houston (51%), followed by Austin (35%), Dallas (28%), San Antonio (27%), Memphis (21%), Nashville (17%), Denver and Chicago (13% each), and Atlanta (11%).**

# Total number of leisure trips to Louisiana



Q20. In total, how many leisure trips have you made to Louisiana?

**Fully 60% of Panelists and 93% of LOT listees have previously taken a leisure trip to LA – indicating high penetration. Many LOT listees are particularly avid visitors, with 54% having taken 5 or more leisure trips to LA. The results underscore the importance and potential of the repeat visitor market to LA.**

# Total number of leisure trips to LA: Independent Panelists by DMA

	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
None	40%	47%	52%	51%	51%	35%	35%	35%	34%	21%	31%
1 or more: net	60%	53%	48%	49%	49%	65%	65%	65%	66%	79%	31%
1 or more: detail											
1 trip	23%	25%	26%	23%	24%	26%	25%	21%	19%	15%	11%
2 trips	15%	11%	14%	13%	9%	21%	17%	21%	19%	15%	13%
3 trips	6%	5%	3%	5%	5%	4%	6%	5%	6%	10%	7%
4 trips	4%	5%	1%	2%	2%	4%	3%	3%	9%	11%	10%
5 trips	3%	3%	2%	3%	3%	2%	3%	4%	4%	6%	4%
6 - 9 trips	3%	2%	1%	3%	2%	2%	6%	6%	4%	3%	5%
10 - 19 trips	3%	2%	2%		1%	5%	2%	3%	4%	10%	9%
20 - 29 trips	1%	1%			1%	2%	2%	1%	2%	5%	4%
30 - 200 trips	1%				1%		2%			3%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	
Average	2.3	1.5	1.0	1.1	1.9	2.0	2.7	2.1	2.5	5.7	4.7
Median	1.0	1.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0	2.0	2.0

Q20. In total, how many leisure trips have you made to Louisiana?

**Among Panelists, the share who have previously visited LA for leisure is near or above 50% in all markets. Previous visitation is highest in Houston (79%), followed by a second tier encompassing Austin, San Antonio, Dallas and Memphis (65-66% each). Visitation is lowest from Denver (53%), Nashville (49%), Atlanta (49%), and Chicago (48%). The high levels of previous visitation imply opportunities to potentially encourage repeat visits.**

# Outline

- Objectives and methodology
- Executive summary
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- Future leisure travel to Louisiana

# What word, phrase or image first comes to mind when you think of Louisiana as a travel destination? (Comments)

			Differential:
	Panelists	LOT emails	Panel v. LOT
New Orleans	19%	5%	14%
Mardi Gras	10%	2%	8%
Cajun	10%	9%	1%
Food	9%	24%	-16%
Fun	5%	10%	-5%
Casino	4%	4%	0%
Party	2%	1%	2%
Bayou	2%	1%	1%
Swamp	2%	2%	0%
French	2%	2%	0%
Bourbon	2%		2%
Music	2%	4%	-2%
Gambling	1%	1%	0%
Humid	1%		1%
Culture	1%	4%	-3%
Let the good times roll (Eng/Fr)	1%	4%	-4%
History	1%	2%	-2%
Seafood	1%	2%	-1%
Family	0%	2%	-1%
Home	0%	3%	-2%
People		2%	-2%

Q21. What word, phrase or image first comes to mind when you think of Louisiana as a travel destination?

Results are based on word count analysis of comments – i.e. word counts per 100 comments, roughly equivalent to approximate % of comments which include word.

**Independent Panelists are most likely to cite New Orleans (19%), Mardi Gras (10%), Cajun (10%), and food (9%). LOT listees are most likely to mention food (24%), fun (10%), and Cajun (9%). Comparing the two groups, Panelists are relatively more likely than Listees to cite New Orleans (+14 pts higher) and Mardi Gras (+8 pts), and less likely to cite food (-16 pts) and fun (-5 pts). These results may imply opportunities to reinforce messages around food and fun in the broader marketplace, insofar as these attributes might be underappreciated relative to LA fans (represented by listees).**

# What makes Louisiana different and distinctive as a travel destination? (Comments)

			Differential:
	Independent Panel	LOT email list	Panel v. LOT
Food	27%	44%	-16%
Culture	25%	30%	-5%
New Orleans	16%	7%	9%
Music	9%	13%	-4%
Cajun	8%	8%	0%
People	7%	24%	-16%
Mardi Gras	7%		7%
History	5%	14%	-9%
Unique	4%	4%	0%
French	4%	2%	2%
Different	4%	6%	-2%
Casinos	3%	3%	-1%
Fun	3%	5%	-3%
Swamps	2%	4%	-2%
Friendly	1%	8%	-7%
Variety	1%	3%	-2%
Beautiful		4%	-4%
Festivals		3%	-3%

Q22. In your opinion, what (if anything) makes Louisiana different and distinctive as a leisure travel destination? If you haven't visited Louisiana before, please respond based on your impressions.

Results are based on word count analysis of comments – i.e. word counts per 100 comments, roughly equivalent to approximate % of comments which include word.

*Independent Panelists are most likely to cite food (27%), culture (25%), New Orleans (16%), music (9%), and Cajun (8%). LOT listees are most likely to mention food (44%), culture (30%), people (24%), history (14%), and music (13%). Comparing the two groups, Panelists are relatively more likely than Listees to cite New Orleans (+9 pts) and Mardi Gras (+7 pts), and less likely to cite food (-16 pts), people (-16 pts), history (-9 pts), friendly (-7 pts), and culture (-5 pts). These results may imply opportunities to broaden appreciation of LA's attributes in the broader marketplace, including food, people/friendliness, culture, and history.*

# What do you dislike or feel is lacking about Louisiana? Are there any characteristics of LA which would deter you from visiting? (Comments)

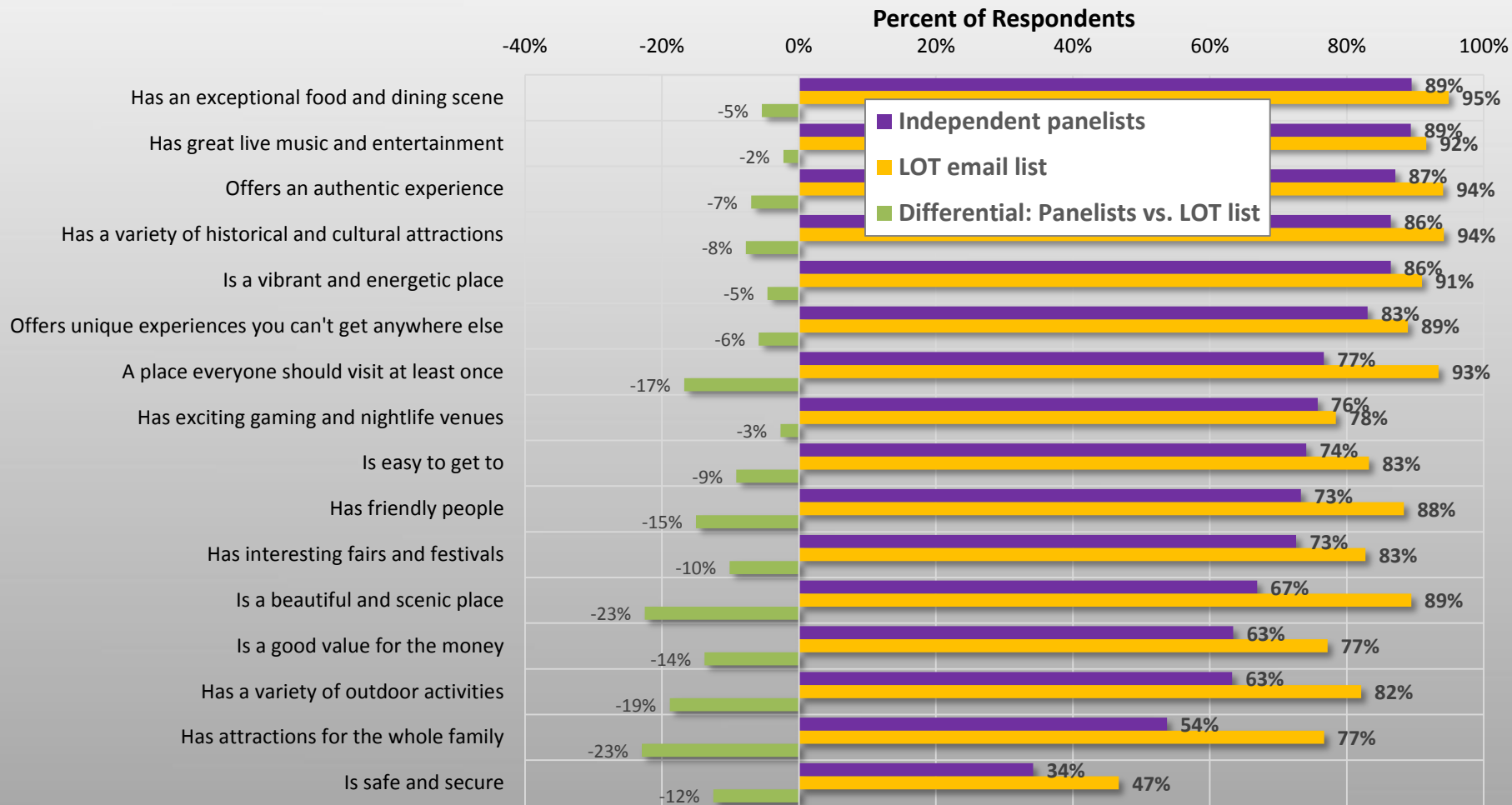
			Differential:
	Independent Panel	LOT email list	Panel v. LOT
Nothing/none/na	32%	28%	4%
Humidity	7%	5%	2%
Crime	6%	7%	-1%
Dirty	5%	1%	4%
Safety	5%	4%	0%
Heat	3%	2%	1%
Weather	3%	2%	1%
Summer	2%	3%	0%
Hurricanes	2%	2%	0%
Roads/highways	1%	6%	-5%

Q23. What, if anything, do you dislike or feel is lacking about Louisiana as a vacation destination? Are there are any characteristics of Louisiana or impressions you have of Louisiana which would deter you from visiting?

Results are based on word count analysis of comments – i.e. word counts per 100 comments, roughly equivalent to approximate % of comments which include word.

**A large share of respondents cite no deterrents to visiting. Among those who cite concerns, the most common issues are weather-related (humidity, heat, summer, hurricanes), dirtiness (among panelists), safety, and roads/highways (among LOT listees). Panelists' relatively high mention of dirtiness may imply a misperception. LOT listees' relatively high mention of roads (particularly poor road conditions) may point towards an opportunity for improving the visitor experience.**

# Agreement with statements about Louisiana (top 2 box)



Q24. Please rate the extent to which you agree or disagree with the following statements about Louisiana, based on your past experiences or impressions.  
(Percent responding 4 or 5, on 1-5 scale where 1=strongly disagree, 3=neutral, and 5=strongly agree)

*Both Panelists and LOT listees have largely positive impressions of LA, led by food/dining, music/entertainment, authentic experiences, historic and cultural attractions, vibrancy/energy, and unique experiences. The leading identified concern is safety/security, and to a more modest degree attractions for the whole family, variety of outdoor activities, and value for the money. LOT listees are uniformly more positive than Panelists, particularly regarding family attractions, beauty/scenery, variety of outdoor activities, a place everyone should visit at least once, friendliness, and value – potentially indicating that these attributes may be underappreciated in the broader marketplace.*



# Agreement with statements about Louisiana: Independent Panelists by DMA



	OVERALL	Denver	Chicago	Atlanta	Nashville	Memphis	Dallas	San Antonio	Austin	Houston	DMA range
Has an exceptional food and dining scene	89%	91%	87%	88%	90%	96%	90%	91%	89%	87%	9%
Has great live music and entertainment	89%	90%	86%	90%	90%	92%	90%	88%	92%	86%	6%
Offers an authentic experience	87%	86%	90%	87%	88%	96%	83%	86%	86%	86%	13%
Has a variety of historical and cultural attractions	86%	86%	83%	88%	82%	90%	86%	86%	92%	87%	10%
Is a vibrant and energetic place	86%	87%	85%	86%	87%	96%	87%	90%	82%	83%	14%
Offers unique experiences you can't get anywhere else	83%	81%	85%	83%	79%	96%	83%	83%	85%	80%	17%
A place everyone should visit at least once	77%	72%	76%	79%	73%	80%	83%	79%	74%	73%	11%
Has exciting gaming and nightlife venues	76%	60%	61%	87%	73%	78%	86%	78%	76%	84%	27%
Is easy to get to	74%	51%	60%	71%	69%	88%	84%	78%	81%	91%	41%
Has friendly people	73%	64%	73%	74%	74%	80%	75%	77%	66%	77%	16%
Has interesting fairs and festivals	73%	74%	75%	82%	66%	76%	76%	75%	65%	65%	17%
Is a beautiful and scenic place	67%	57%	74%	76%	63%	75%	71%	69%	62%	58%	19%
Is a good value for the money	63%	48%	58%	60%	58%	58%	72%	67%	70%	73%	25%
Has a variety of outdoor activities	63%	53%	62%	80%	65%	68%	66%	62%	56%	61%	27%
Has attractions for the whole family	54%	44%	57%	66%	56%	56%	53%	51%	51%	49%	22%
<u>Is safe and secure</u>	<u>34%</u>	<u>23%</u>	<u>38%</u>	<u>44%</u>	<u>39%</u>	<u>34%</u>	<u>35%</u>	<u>33%</u>	<u>24%</u>	<u>36%</u>	<u>21%</u>
Average-all categories	73%	67%	72%	77%	72%	79%	76%	74%	72%	74%	12%

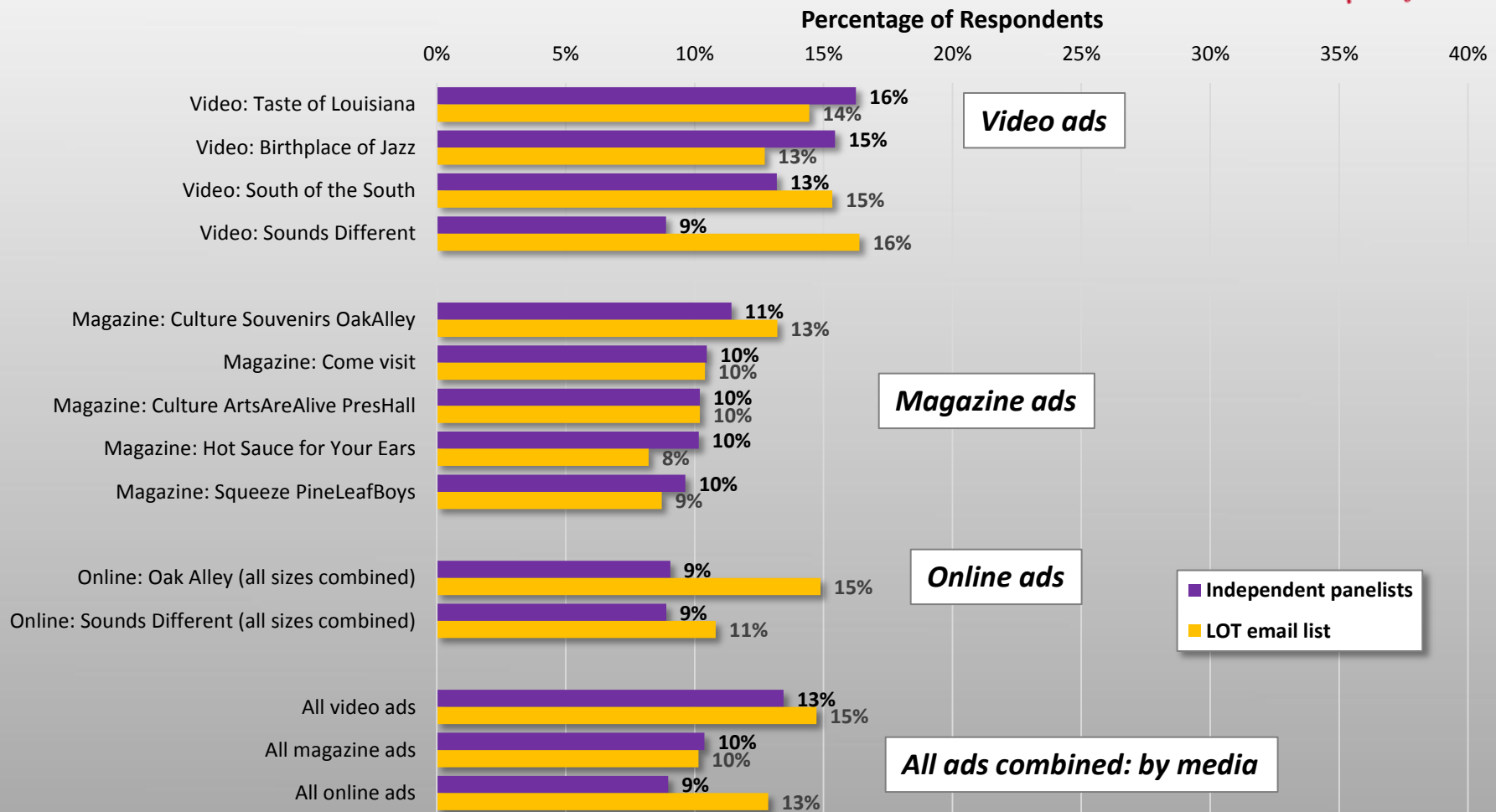
Q24. Please rate the extent to which you agree or disagree with the following statements about Louisiana, based on your past experiences or impressions.  
(Percent responding 4 or 5, on 1-5 scale where 1=strongly disagree, 3=neutral, and 5=strongly agree)

*Among panelists, favorability ratings are similar across DMAs for most attributes, with some exceptions, particularly easy to get to (varies by proximity to LA), and exciting gaming and nightlife venues (27 ppt variance across DMAs).*

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# Recall of Louisiana travel advertisements

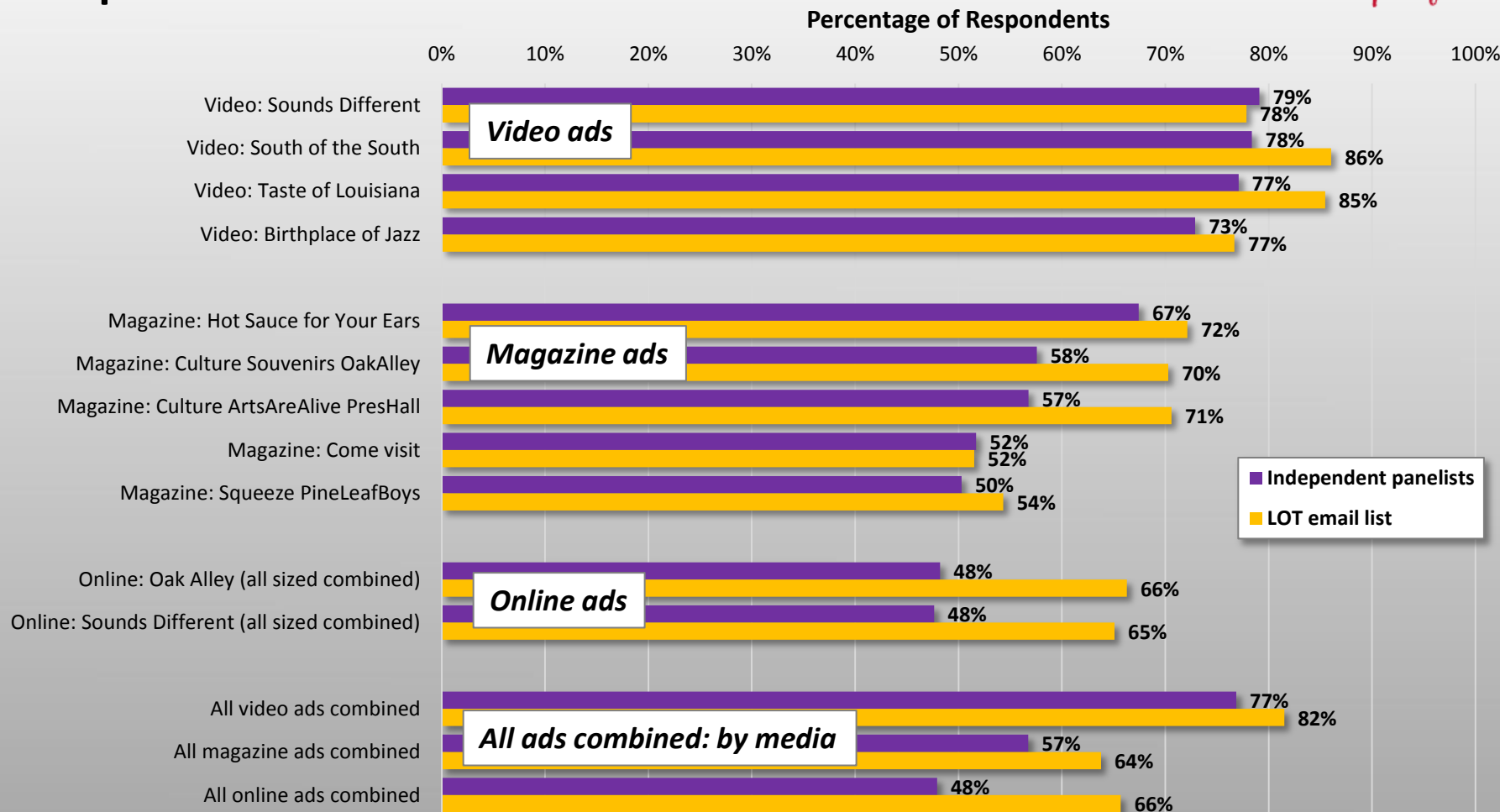


Q25/28/31. During the past 2 months, do you recall having seen this advertisement (on TV or online) (in a magazine) (online)?

Note: Each respondent rated one randomly selected ad of each type (video, magazine, and online). Each respondent thus rated 3 ads.

**Among Panelists, ad recall was slightly higher for video ads (13% combined) than magazine ads (10% combined) and online ads (9% combined). LOT listees had slightly higher levels of recall than Panelists for video ads (15% vs. 13%) and online ads (13% vs. 9%).**

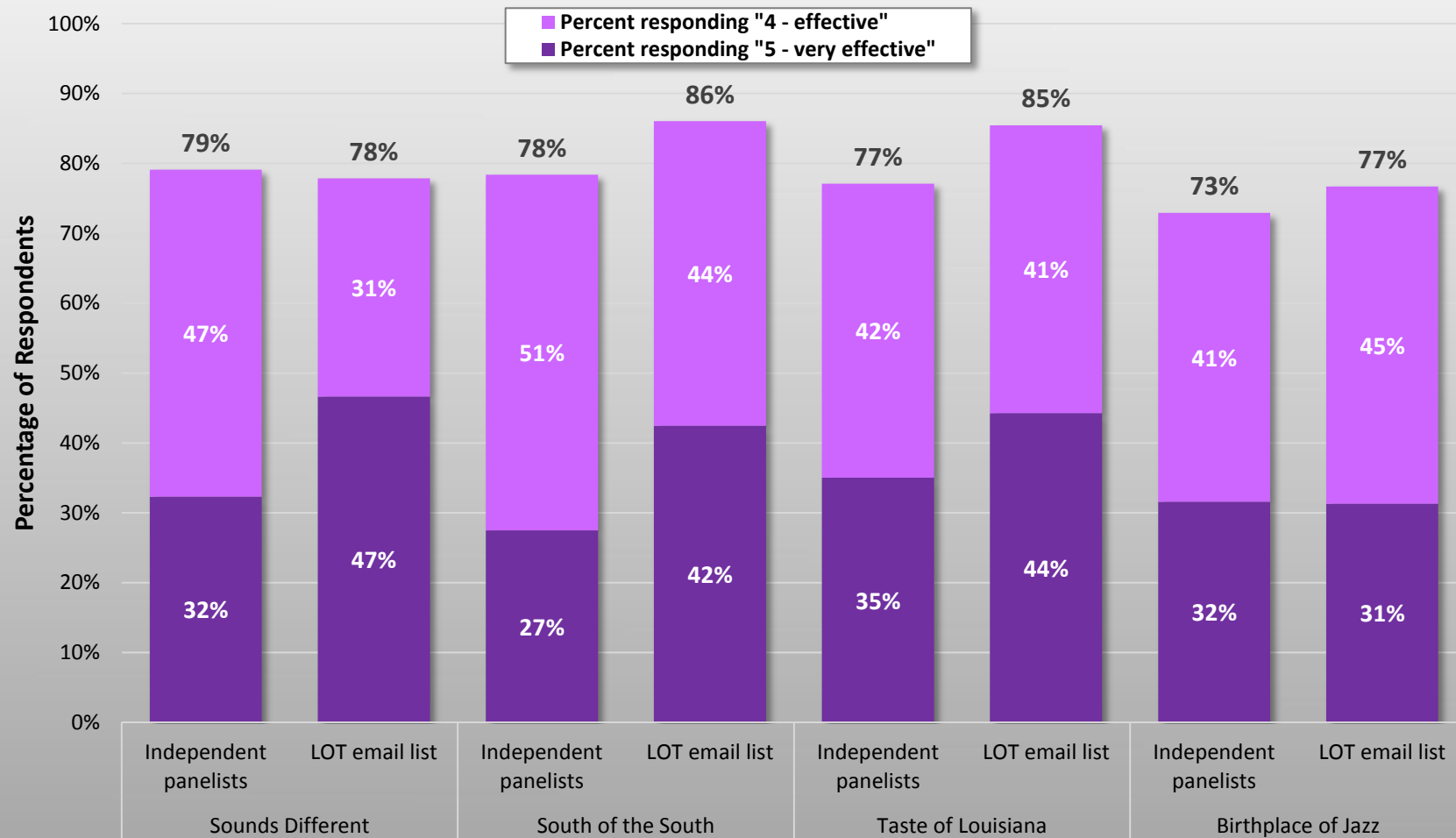
# Effectiveness of Louisiana travel advertisements: top 2 box



Q26/29/32. How effective do you think this advertisement is in portraying Louisiana as a place you would enjoy visiting for leisure reasons?  
(Percent responding 4 or 5, on 1-5 scale where 1=very ineffective, 2=ineffective, 3=neither effective nor ineffective, 4=effective, and 5=very effective)

**Among Panelists, ad effectiveness was higher for video ads (77% responding "effective" combined) than magazine ads (57% effective) and online ads (48% effective). LOT listees had more favorable opinions than Panelists of the effectiveness of almost all ads.**

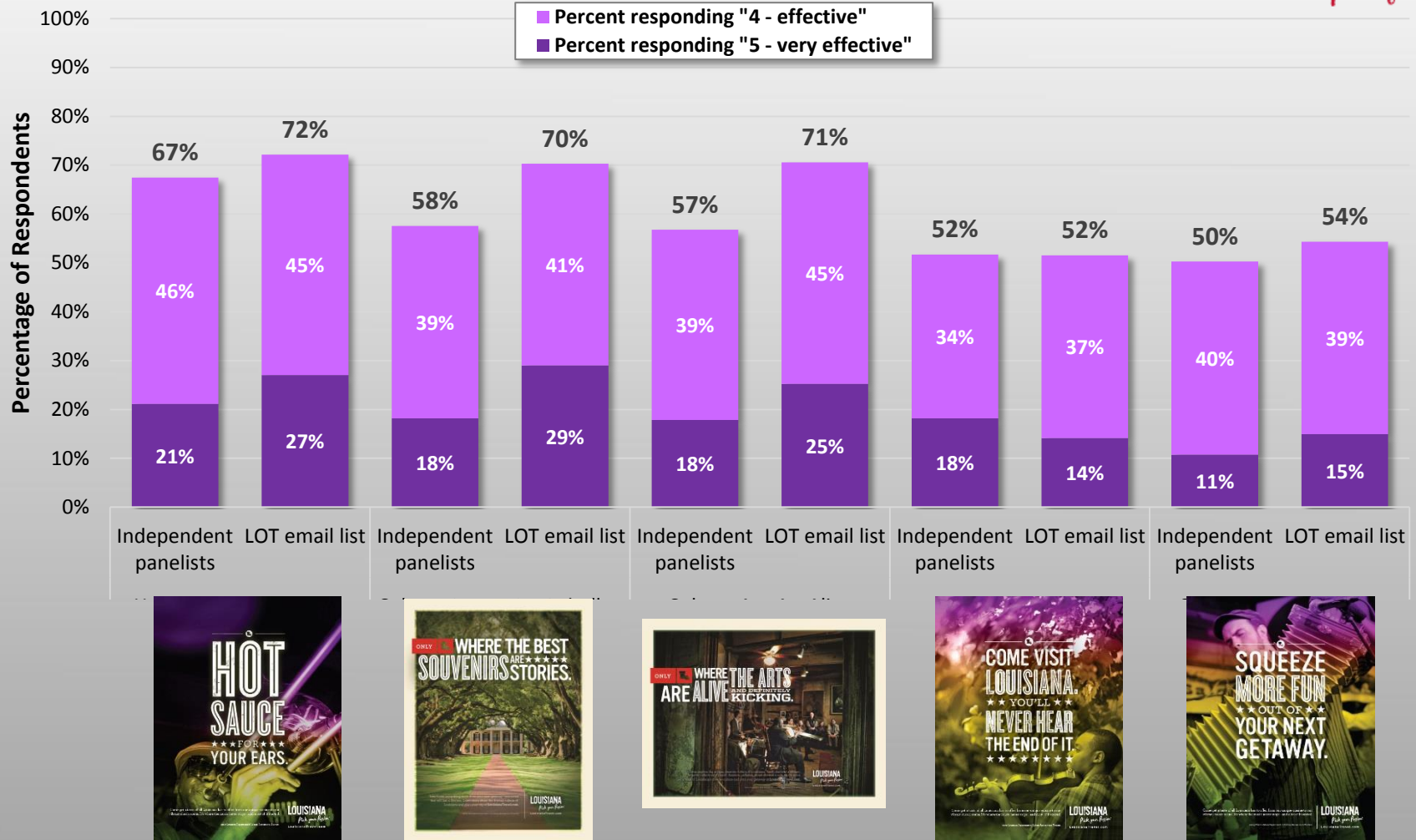
# Detail: Effectiveness of video advertisements



Q26. How effective do you think this advertisement is in portraying Louisiana as a place you would enjoy visiting for leisure reasons?

***All four video ads are viewed as effective by a large majority of both sample groups. Differences between ads are relatively modest, with Birthplace of Jazz scoring slightly behind the other three ads.***

# Detail: Effectiveness of magazine advertisement



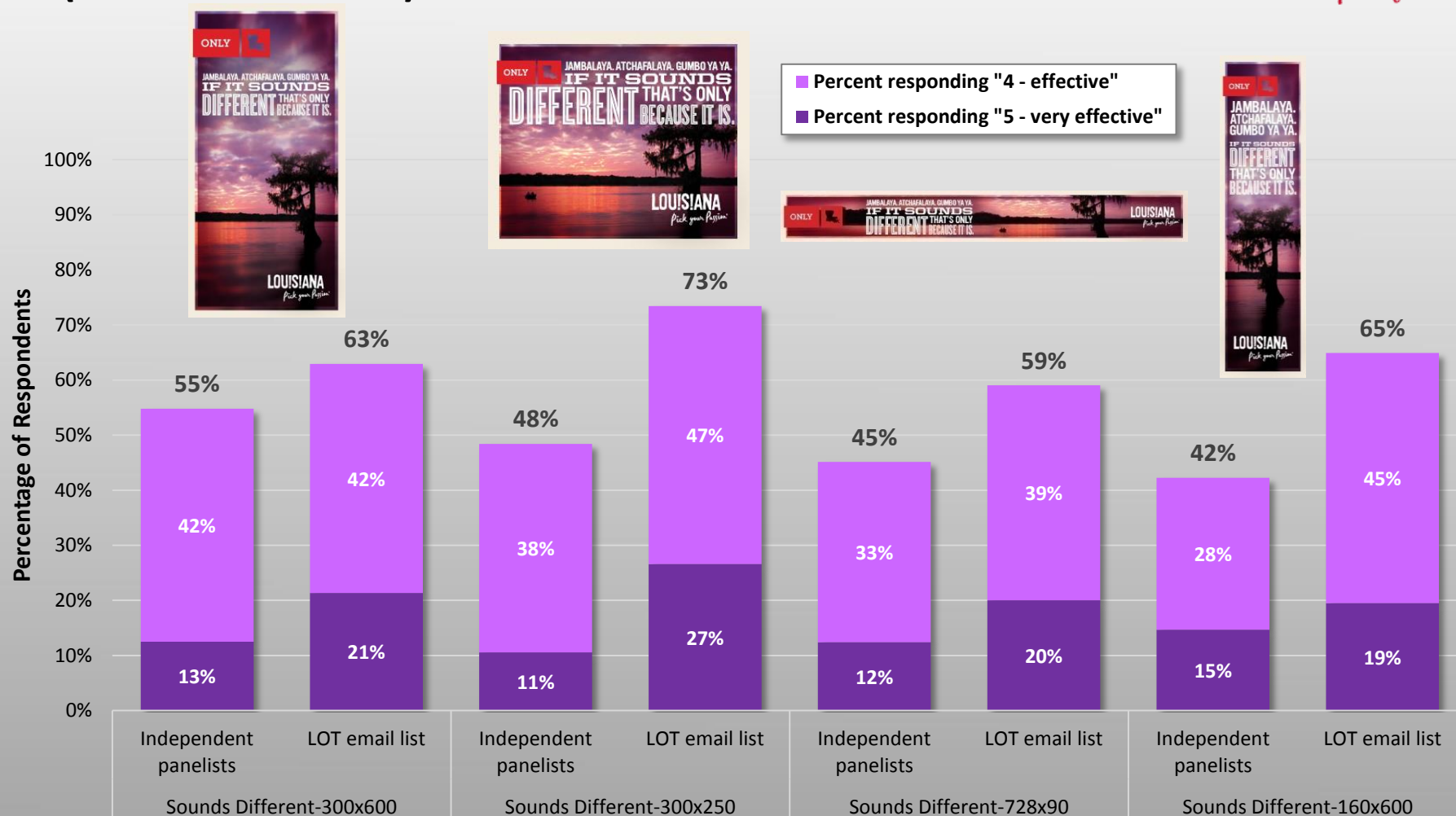
Q32. How effective do you think this advertisement is in portraying Louisiana as a place you would enjoy visiting for leisure reasons?

**All ads were perceived to be effective by at least 50% of respondents. "Hot Sauce" was most broadly effective for both groups, while Come Visit and Squeeze were least effective.**



# Detail: Effectiveness of online advertisement (Sounds different)

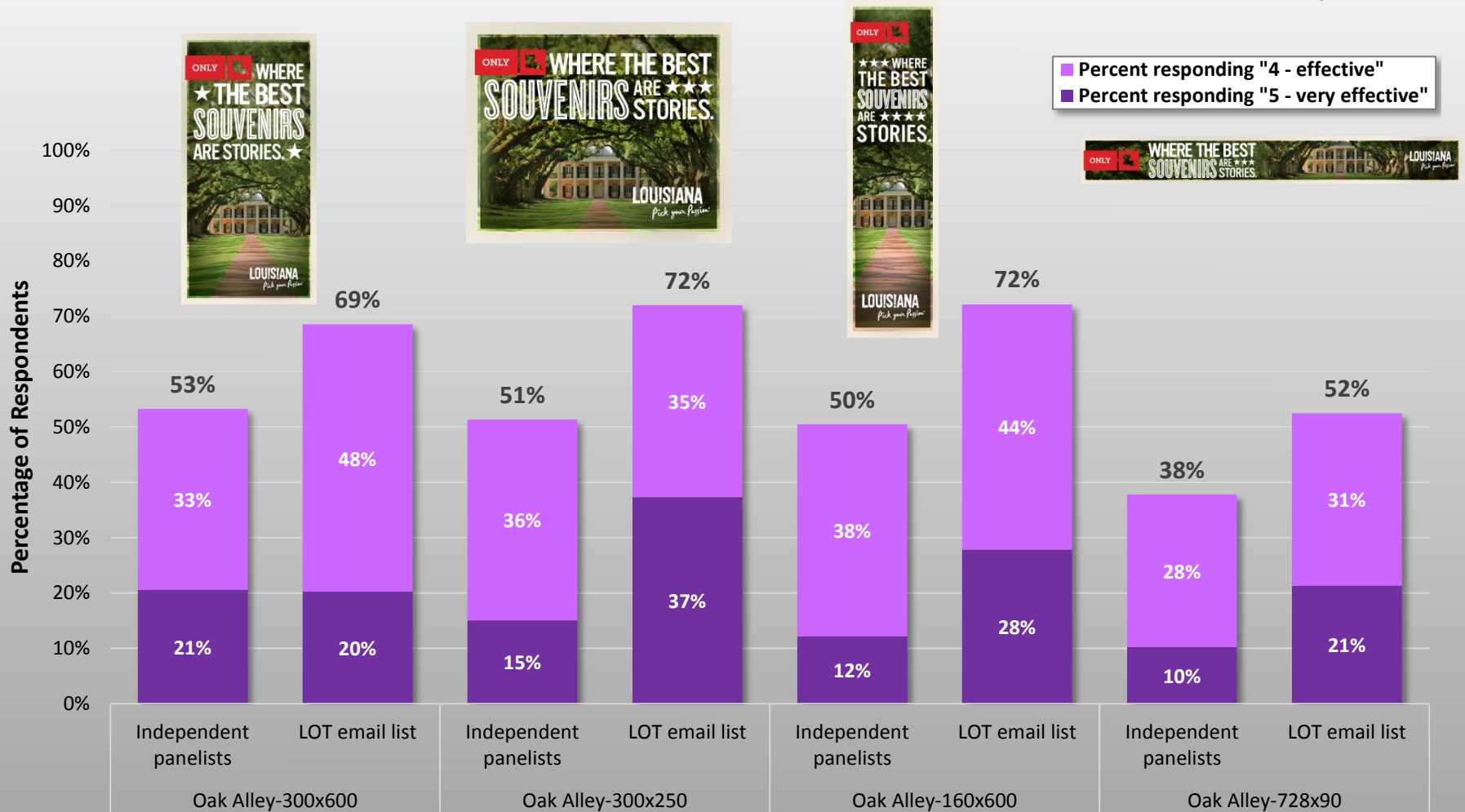
**LOUISIANA**  
*Pick your Passion®*



Q29. How effective do you think this advertisement is in portraying Louisiana as a place you would enjoy visiting for leisure reasons? – Sounds Different

**Ad effectiveness ratings differed somewhat by ad size/dimensions. However, the hierarchy of preferences differed between Panelists and LOT listees, making general conclusions difficult.**

# Detail: Effectiveness of online advertisement (Oak Alley)

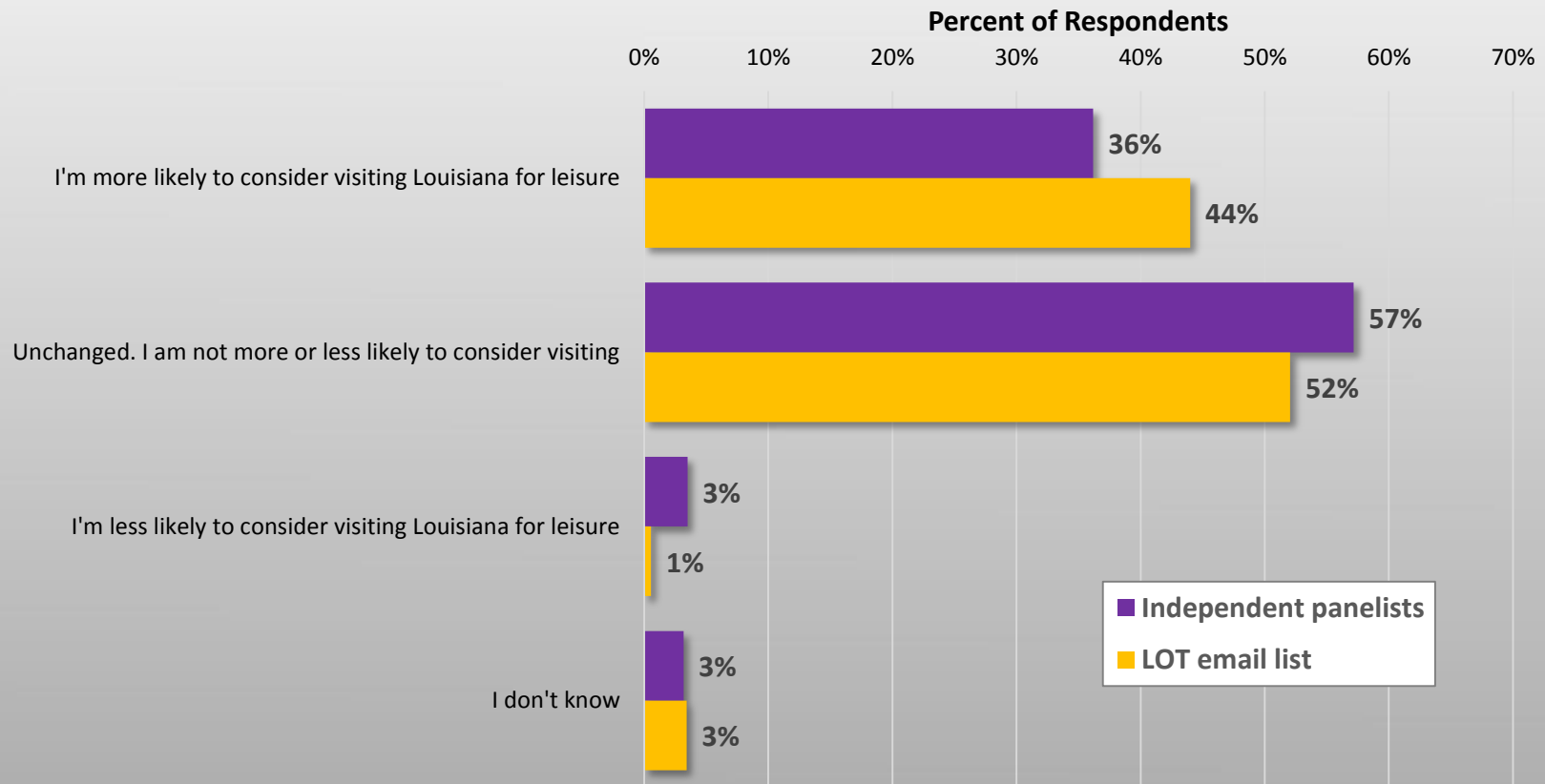


Q29. How effective do you think this advertisement is in portraying Louisiana as a place you would enjoy visiting for leisure reasons? – Oak Alley

**The 728x90 execution of Oak Alley was rated as less effective than the other executions by both panelists and LOT listees.**



# Impact of ads on likelihood to consider visiting Louisiana in next 12 months

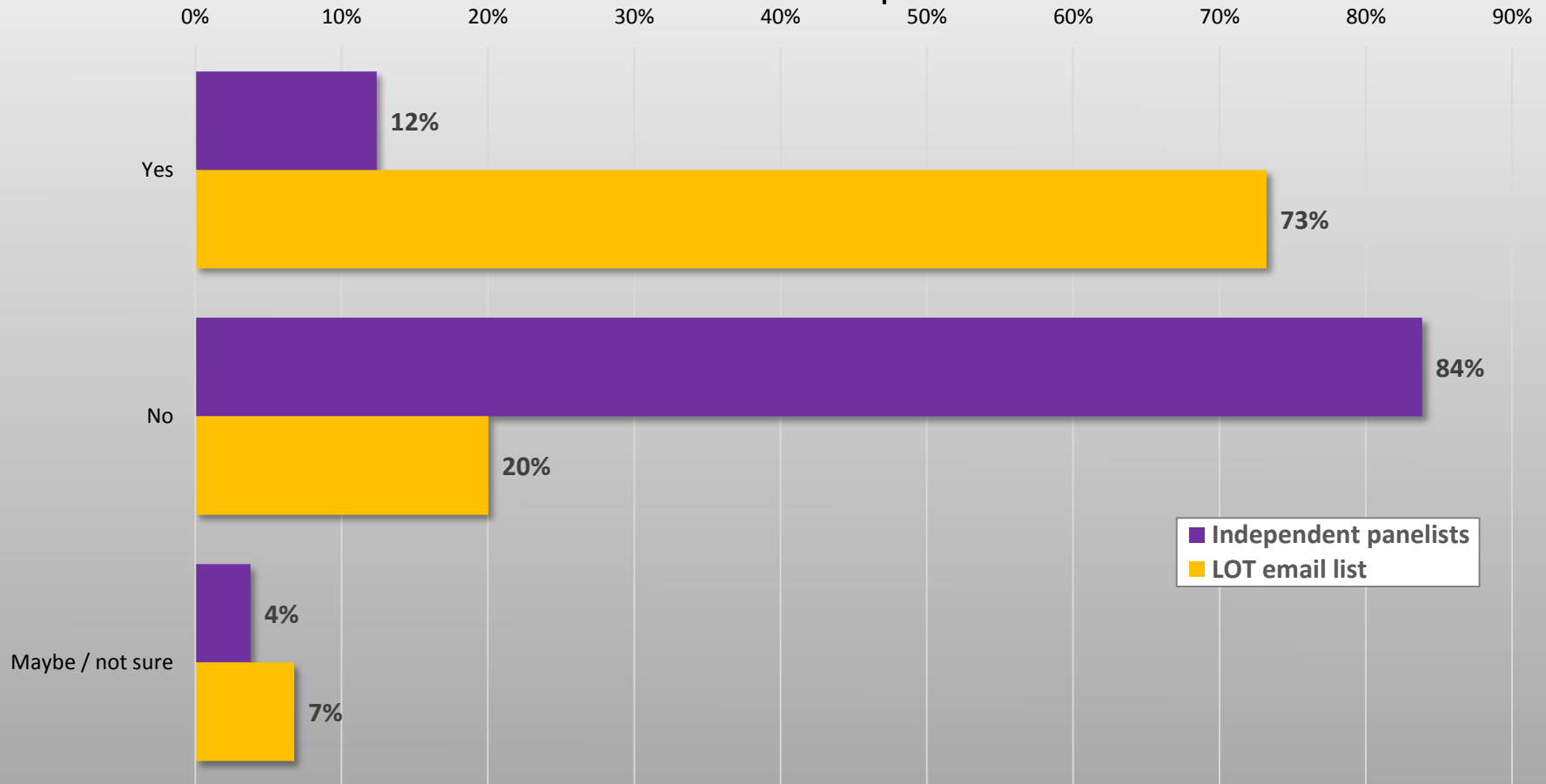


Q34. Altogether, how did the advertisements you viewed today affect your likelihood to consider visiting Louisiana for leisure in the next 12 months?

**Overall, the ads had a positive (36-44%) or neutral (57-52%) effect on intent to visit LA by both respondent groups (with LOT listees expressing the strongest enthusiasm).**

# Prior visitation to Louisiana Office of Tourism website

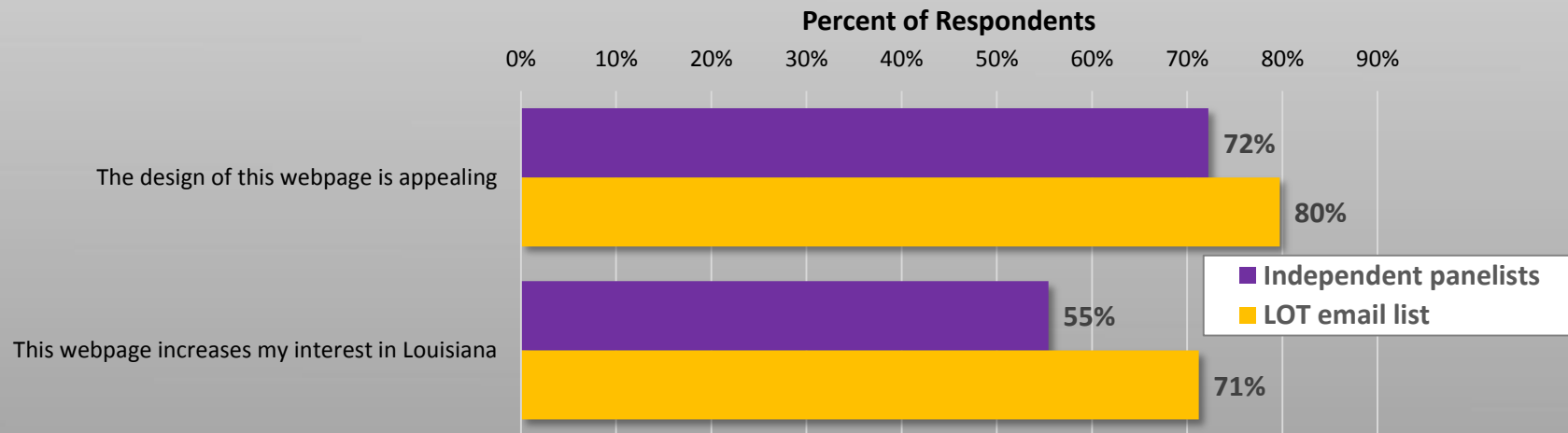
Percent of Respondents



Q35. Have you visited the Louisiana Office of Tourism webpage before?

***LOT listees were far more likely to have visited the LOT website (73%) than independent panelists (12%), as would be expected.***

# Perceptions of Louisiana Office of Tourism webpage (top 2 box)

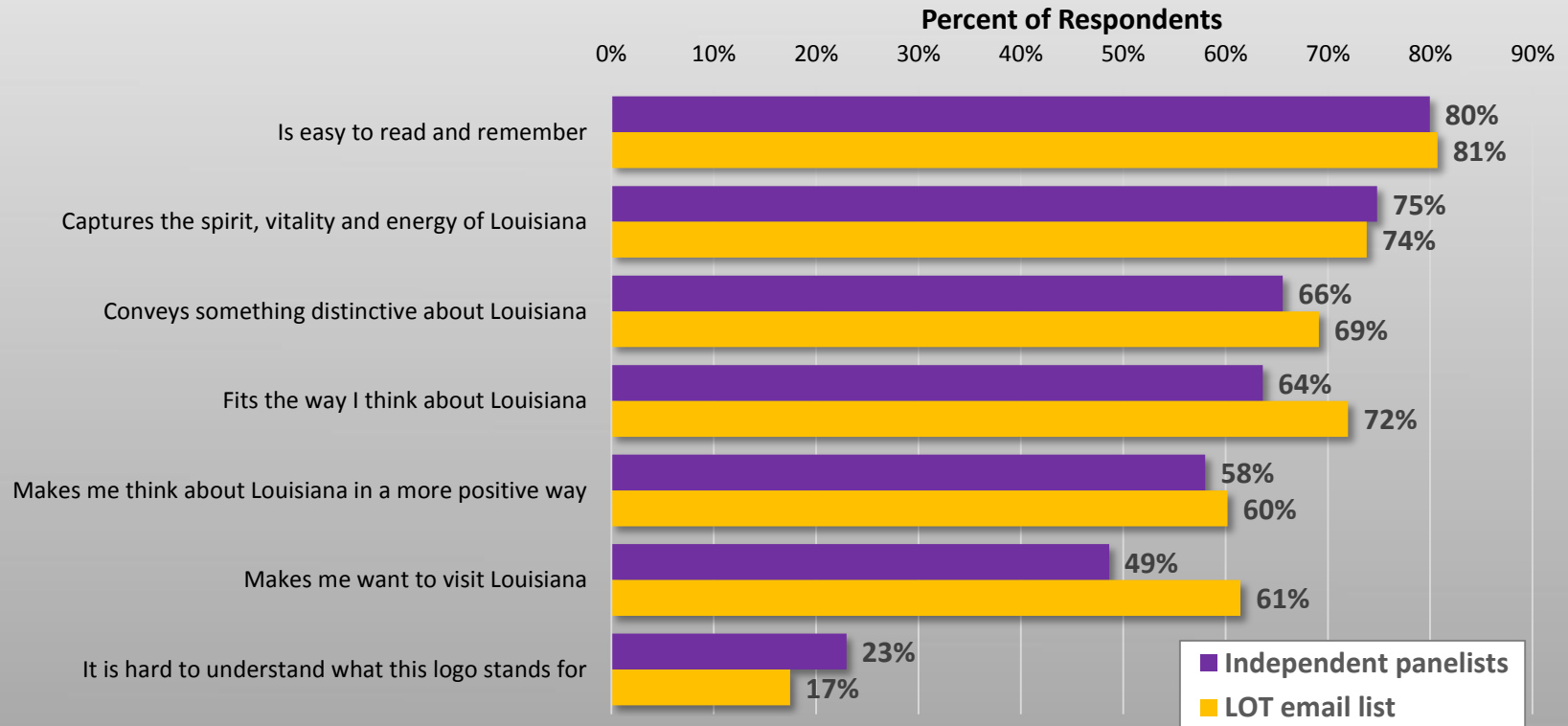


Q36. Please rate your agreement or disagreement with the following statements about this web page.

(Percent responding 4 or 5, on 1-5 scale where 1=strongly disagree, 2=somewhat disagree, 3=neutral, 4=somewhat agree, and 5=strongly agree)

**Most Panelists somewhat/strongly agree that the LOT web page is appealing (72%) and that it increases their interest in LA (55%). LOT listees express even higher agreement on both counts (80% and 71% respectively).**

# Perceptions of Louisiana tourism logo (top 2 box)



Q38. Please indicate how much you agree or disagree that the logo...

(Percent responding 4 or 5, on 1-5 scale where 1=strongly disagree, 2=somewhat disagree, 3=neutral, 4=somewhat agree, and 5=strongly agree)

**Most respondents have favorable reactions to the logo, led by the way it captures the spirit/vitality/energy of LA (75% of panelists). Relatively smaller shares say it “makes me think about LA in a more positive way” (58%) and “makes me want to visit LA” (49%).**

# What, if anything, do you like best about this logo? (Comments)

	Independent panelists	LOT email list
Nothing/none/na	12%	7%
Colors	12%	13%
Exclamation points	10%	14%
Louisiana	9%	12%
Passion	8%	13%
Simple	7%	7%
Pick	6%	6%
Font	4%	3%
Easy	3%	4%
Catchy	3%	3%
Fun	2%	1%
Remember	2%	2%
Short	2%	3%
Choices	2%	1%
Different	2%	2%
Purple	2%	2%
Variety	2%	3%
Excitement	1%	2%

Q39. What, if anything, do you like best about this logo?

Results are based on word count analysis of comments – i.e. word counts per 100 comments, roughly equivalent to approximate % of comments which include word.

***Among the most-liked aspects of the logo are its colors, exclamation points, aspects of the “pick your passion” slogan, simplicity, and font.***

# What, if anything, do you like least about this logo? (Comments)

	Independent panelists	LOT email list
Nothing/none/na	53%	29%
Exclamation points	5%	3%
Passion	4%	12%
Louisiana	4%	8%
Font	3%	5%
Colors	3%	4%
Pick	3%	8%
Plain	2%	3%

Q39. What, if anything, do you like best about this logo?

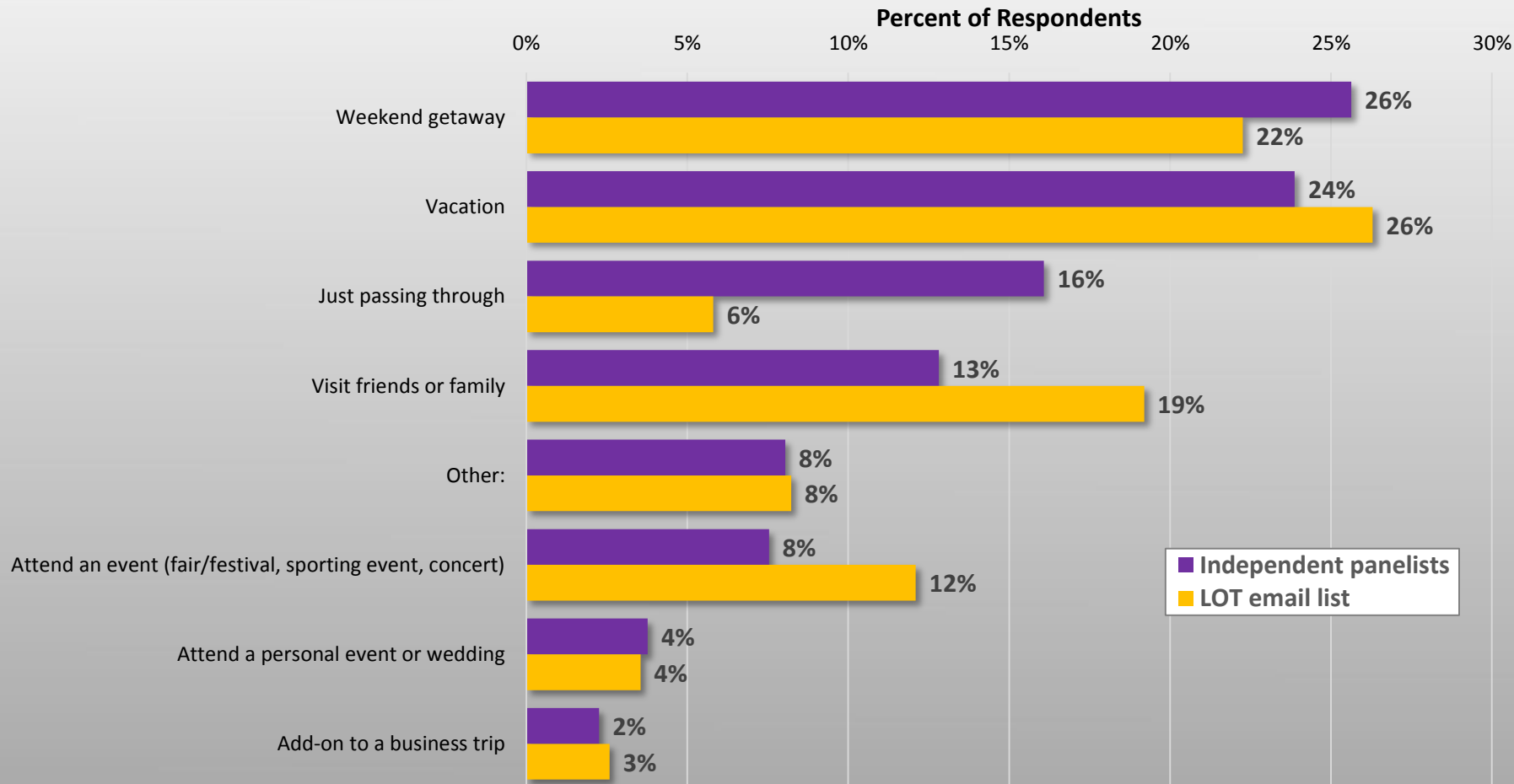
Results are based on word count analysis of comments – i.e. word counts per 100 comments, roughly equivalent to approximate % of comments which include word.

**About half of Panelists said there was nothing in particular that they least liked about the logo. Leading dislikes were similar to the likes: exclamation points, aspects of the “pick your passion” slogan, font, & colors – suggesting these items are particularly distinctive features of the logo.**

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# Primary reason for visiting Louisiana on most recent leisure trip (if visited in past 12 months)



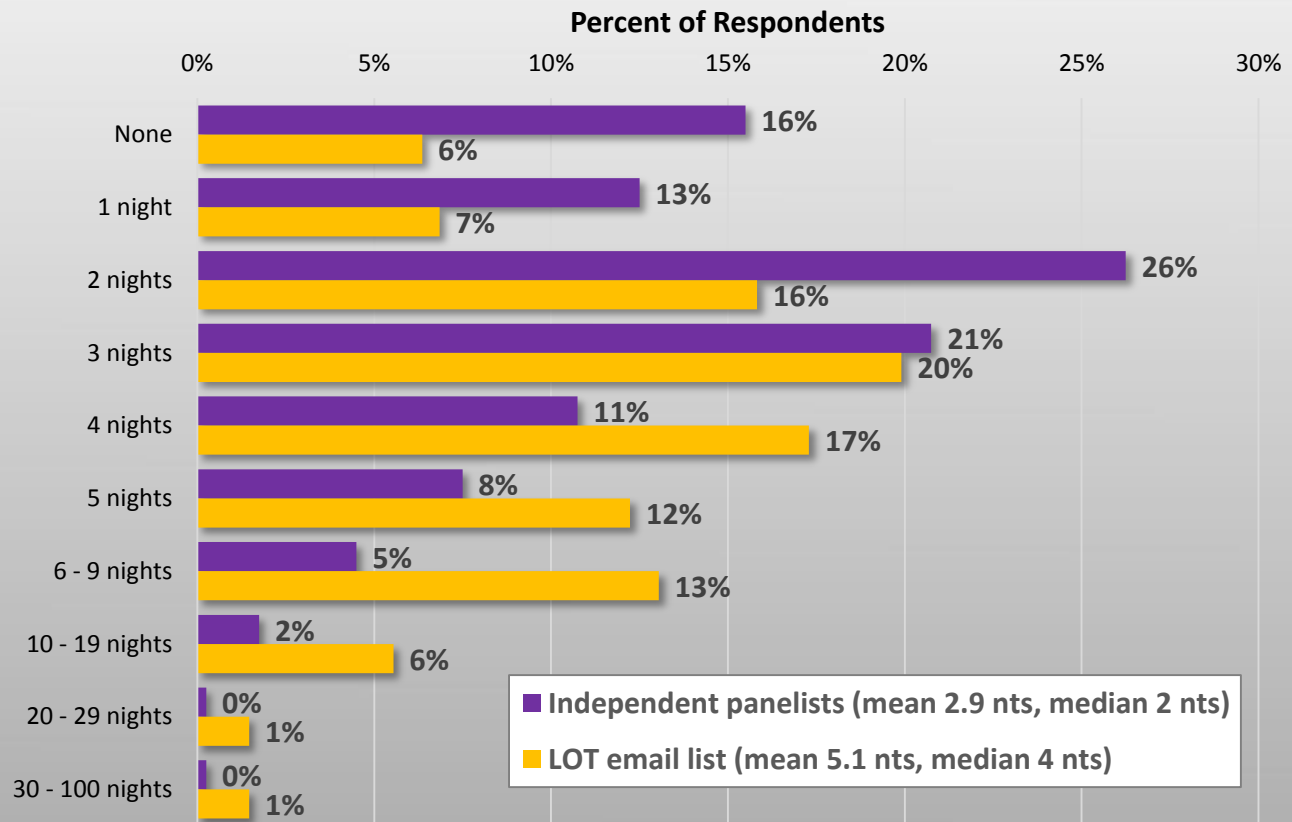
Q45. Which best describes your primary reason for traveling to Louisiana on your most recent leisure trip?

Base: Q19: Traveled to or within Louisiana for purely leisure reasons in the past two years.

- **About half of both groups last visited LA for a weekend getaway or vacation, with the remaining half coming for other leisure reasons.**
- **Panelists were more likely to have just passed through; LOT listees were more likely to have visited friends/family or attended an event.**



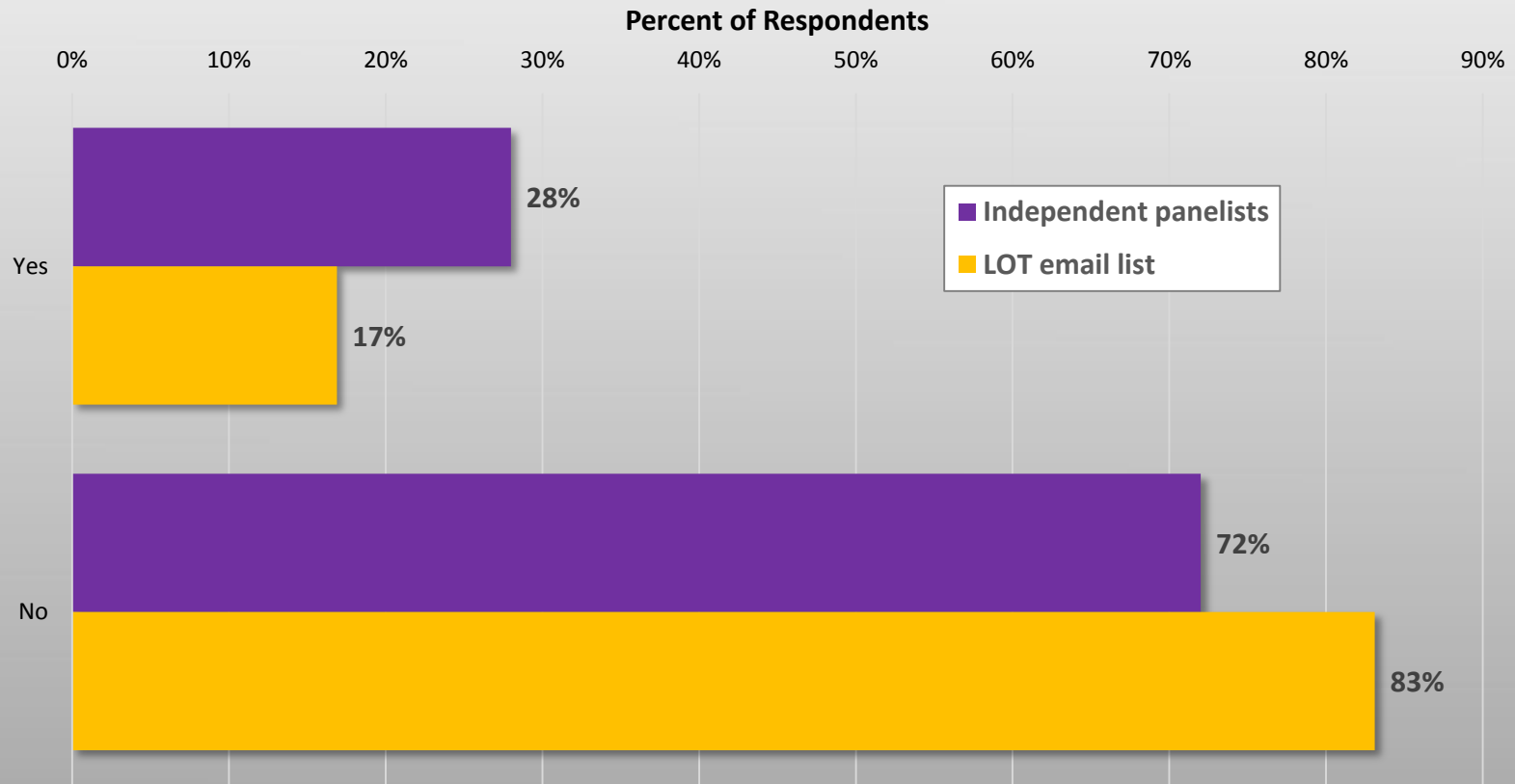
# Total number of nights spent in Louisiana



Q46. How many total nights did you spend in the State of Louisiana?

**In general, Panelists took much shorter trips to LA than LOT listees. Panelists were much more likely than listees to stay 0-2 nts (54% vs. 29%), while listees were much more likely than panelists to stay 4+ nts (51% vs. 25%). Long stays are a further indicator of listees' enthusiasm for LA (and likely greater vacation time, given older age profile).**

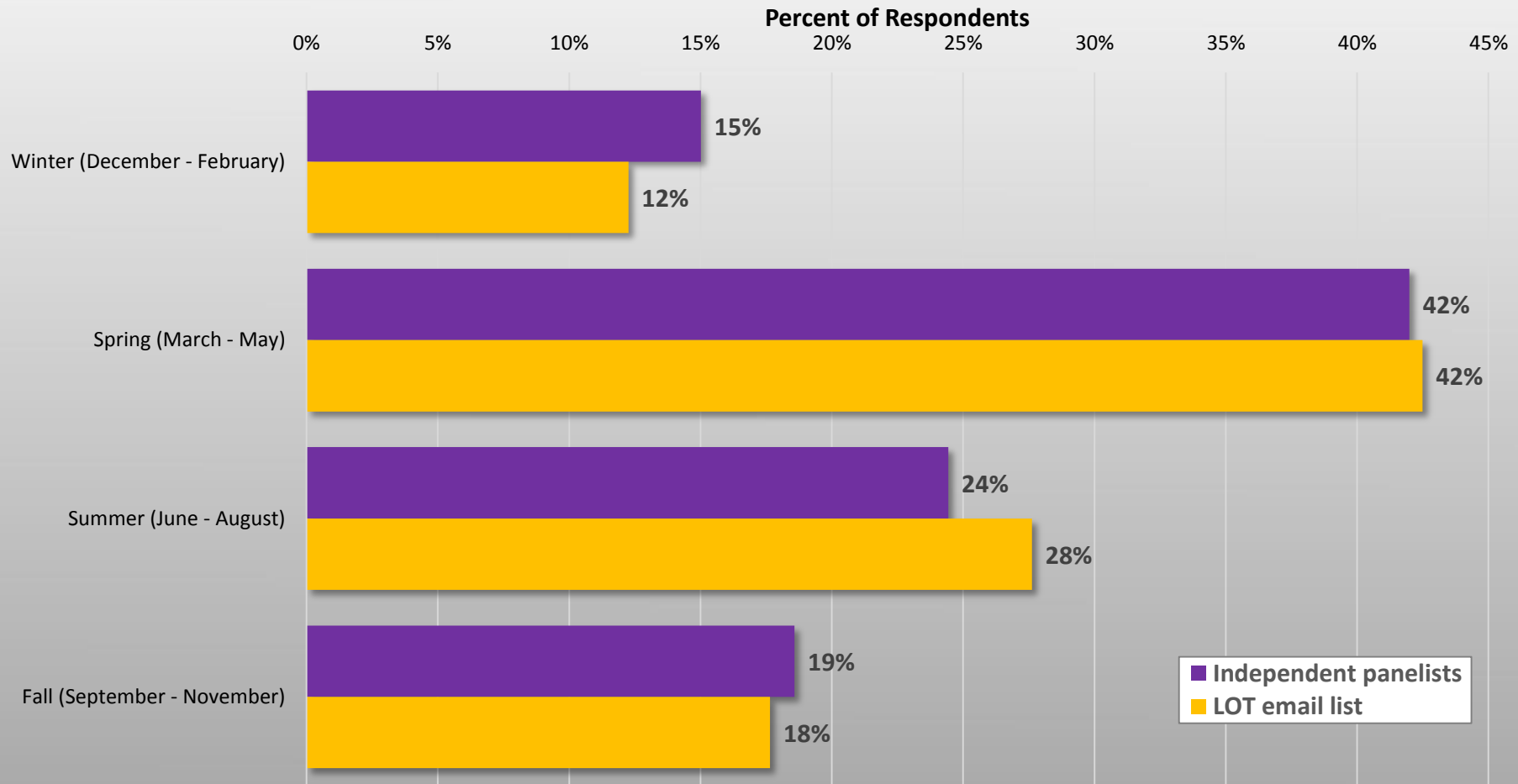
# Use of air travel to reach Louisiana



Q47. Did you fly as part of your travel to get to Louisiana?

- *Panelists were more likely to fly to LA than listees (28% vs. 17%), although the large majority of both groups didn't fly (72 – 83%).*
- *Visitors from Denver (74%) and Chicago (69%) were more likely to fly than visitors from other target DMAs (8-35% flew; DMA results are for panelists only).*

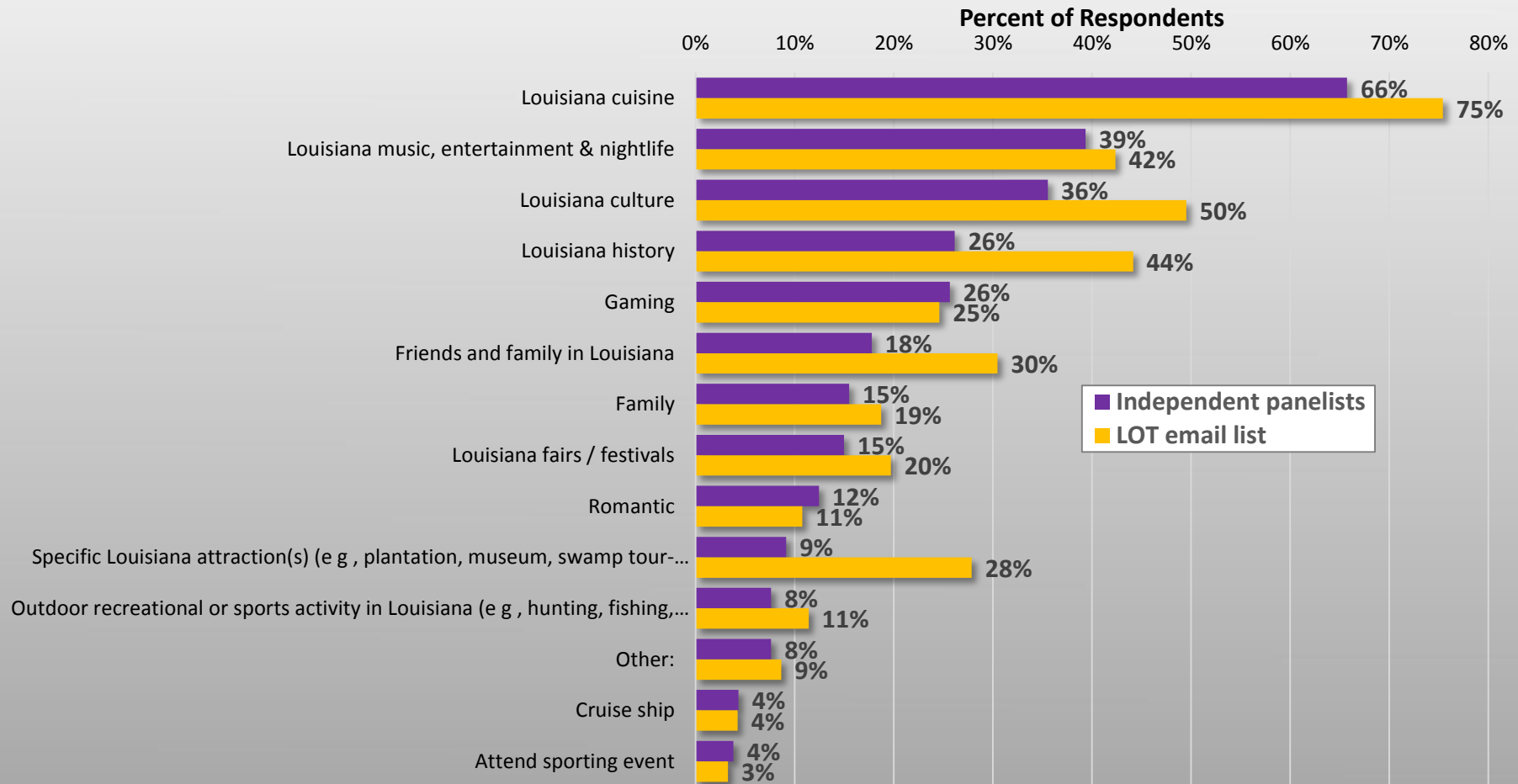
# Season of visit to Louisiana



Q48. In what season did you visit?

**Both groups were most likely to have most recently visited LA in spring (42% each), followed by summer (24-28%). Respondents were least likely to have visited in winter or fall. Note that survey was fielded in June, which likely impacted these results.**

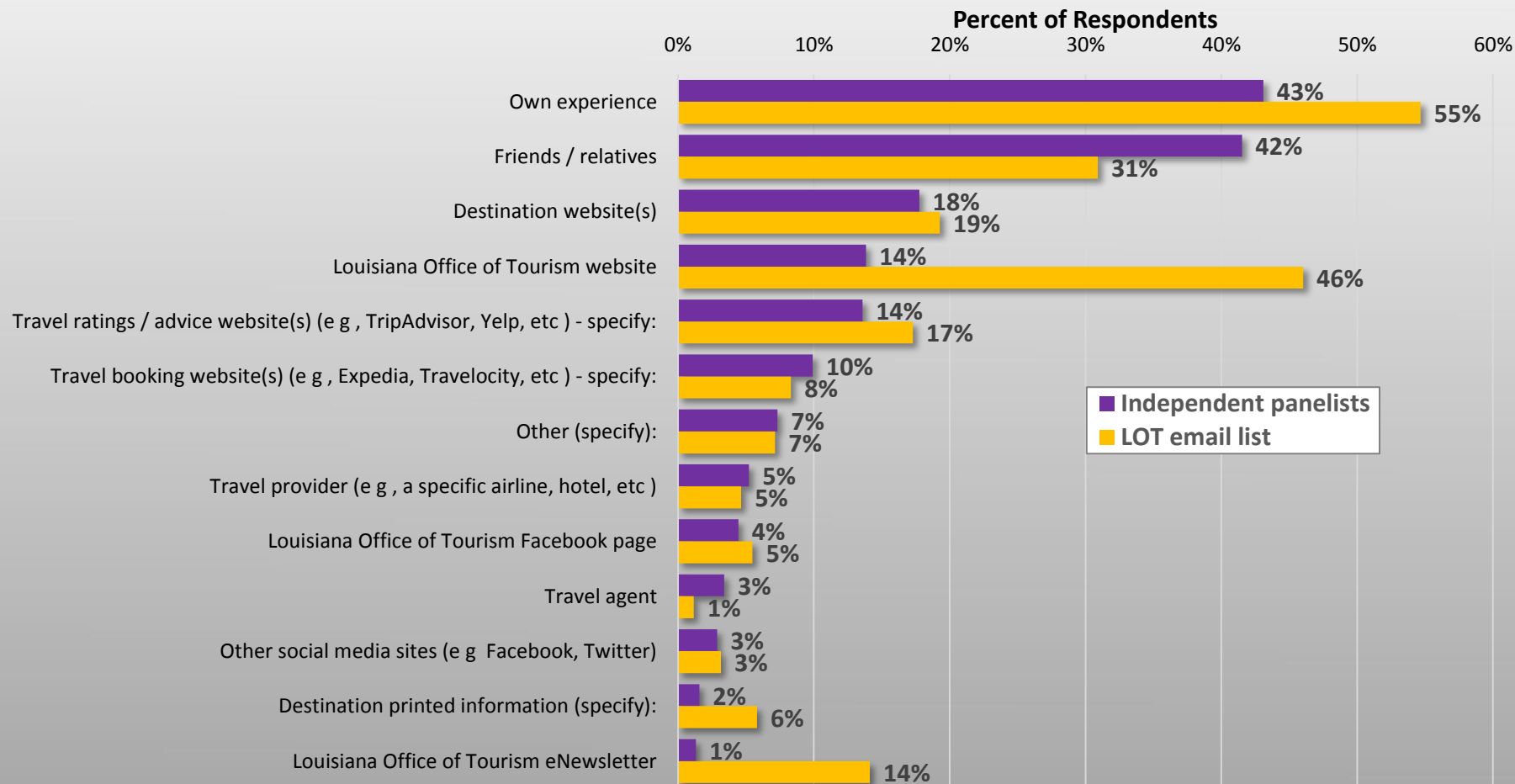
# Key experiences during visit to Louisiana



Q49. What experiences did you focus on during this visit to Louisiana?

**Cuisine was by far the most popular focus for LA trips among both groups. Music/entertainment/nightlife, culture, history, and gaming were among the other leading experiences. LOT listees were more likely to cite almost all reasons, especially cuisine, culture, history, friends/family, and specific attractions.**

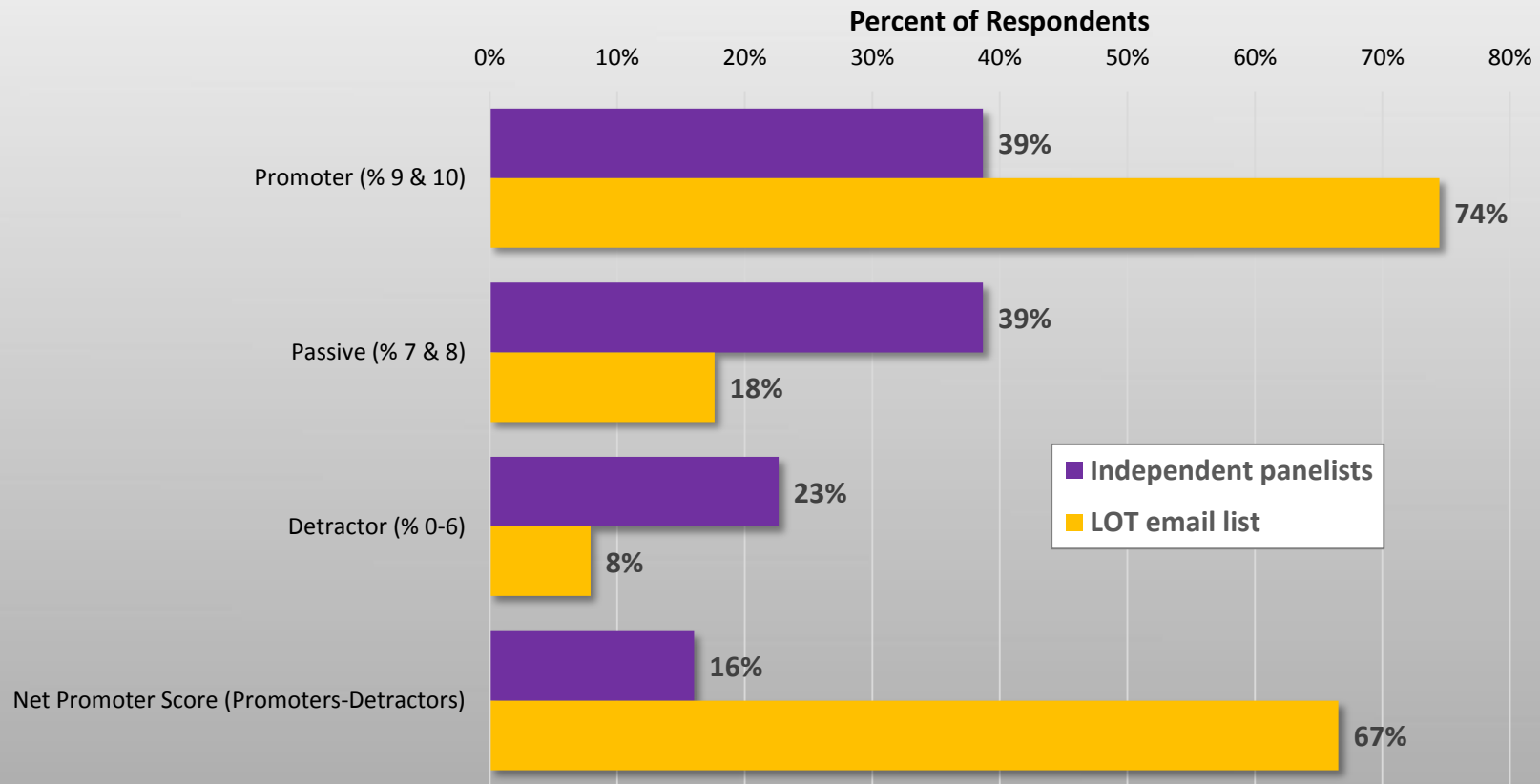
# Sources used for planning trip to Louisiana



Q50. What source(s) of information did you use in planning your trip to Louisiana?

***Personal experience and friends/relatives were leading info sources for both groups, with the LOT website also widely used by LOT listees.***

# Likelihood to recommend Louisiana as a travel destination (Net promoter categories)



Q51. Overall, how likely would you be to recommend Louisiana as a travel destination to a friend or relative?

Response scale: 0=extremely unlikely, 5=neutral, 10=extremely likely. Responses of 9/10 are classified as "promoters," 7/8 as "passive supporters," and 0-6 as "detractors." The net promoter score is calculated as promoters minus detractors.

***LOT listees are quite positive about LA as a travel destination (as reflected in their net promoter scores), while panelists are comparatively mixed.***

# What did you like best about Louisiana on your trip? (Comments)

			Differential:
	Independent Panel	LOT email list	Panel v. LOT
Food	39%	47%	-8%
Music	8%	10%	-3%
Gambling/casinos	7%	3%	4%
New Orleans	6%	5%	1%
Fun	6%	4%	2%
Culture	5%	9%	-4%
Visit	4%	6%	-1%
People	4%	11%	-7%
Everything	3%	7%	-4%
Friends	3%	6%	-3%

Q62. What did you like least about Louisiana on your trip?

Results are based on word count analysis of comments – i.e. word counts per 100 comments, roughly equivalent to approximate % of comments which include word.

***Food was the clear leader. Music, gaming, New Orleans, fun, culture, and people were also widely mentioned, echoing themes elsewhere in the survey results.***

# What did you like least about Louisiana on your trip? (Comments)

			Differential:
	Independent Panel	LOT email list	Panel v. LOT
Nothing/none/na	37%	19%	18%
Safety	8%	9%	-1%
Dirty	6%	0%	6%
Roads	5%	6%	-1%
Humidity	4%	4%	0%
New Orleans	4%	6%	-2%
Feel	4%	3%	0%
Areas	3%	2%	1%
Crowded	3%	0%	3%
Heat	2%	3%	0%

Q52. What did you like best about Louisiana on your trip?

Results are based on word count analysis of comments – i.e. word counts per 100 comments, roughly equivalent to approximate % of comments which include word.

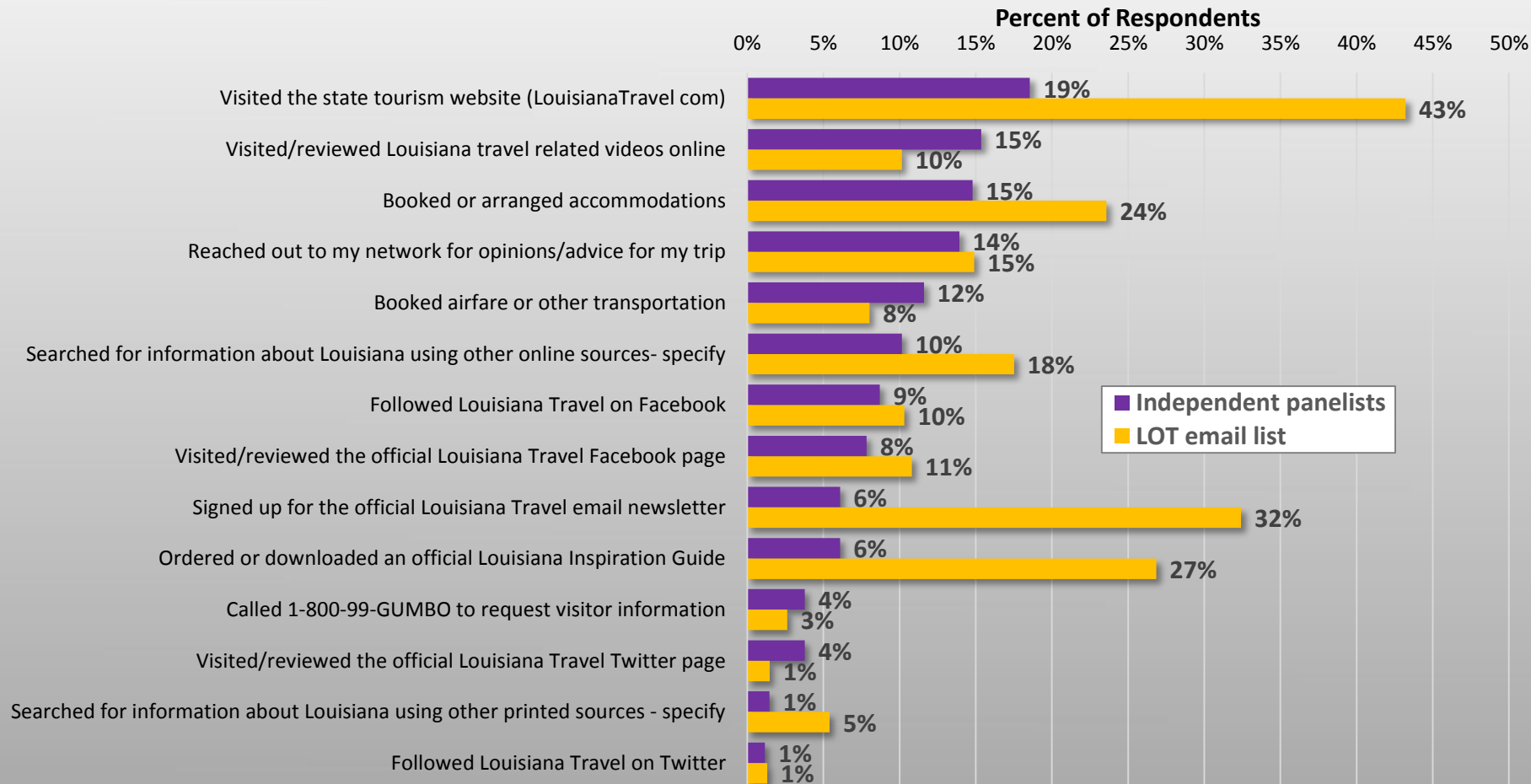
***Safety, cleanliness, roads, and humidity/heat were among the least-liked aspects, again echoing themes in other survey results.***



# Outline

- Objectives and methodology
- Executive summary
- Respondent demographics
- Awareness, interest, and visitation of Louisiana
- Perceptions of Louisiana as a travel destination
- Evaluation of Louisiana Tourism advertising, logo and homepage
- Characteristics of most recent Louisiana leisure trip
- Future leisure travel to Louisiana

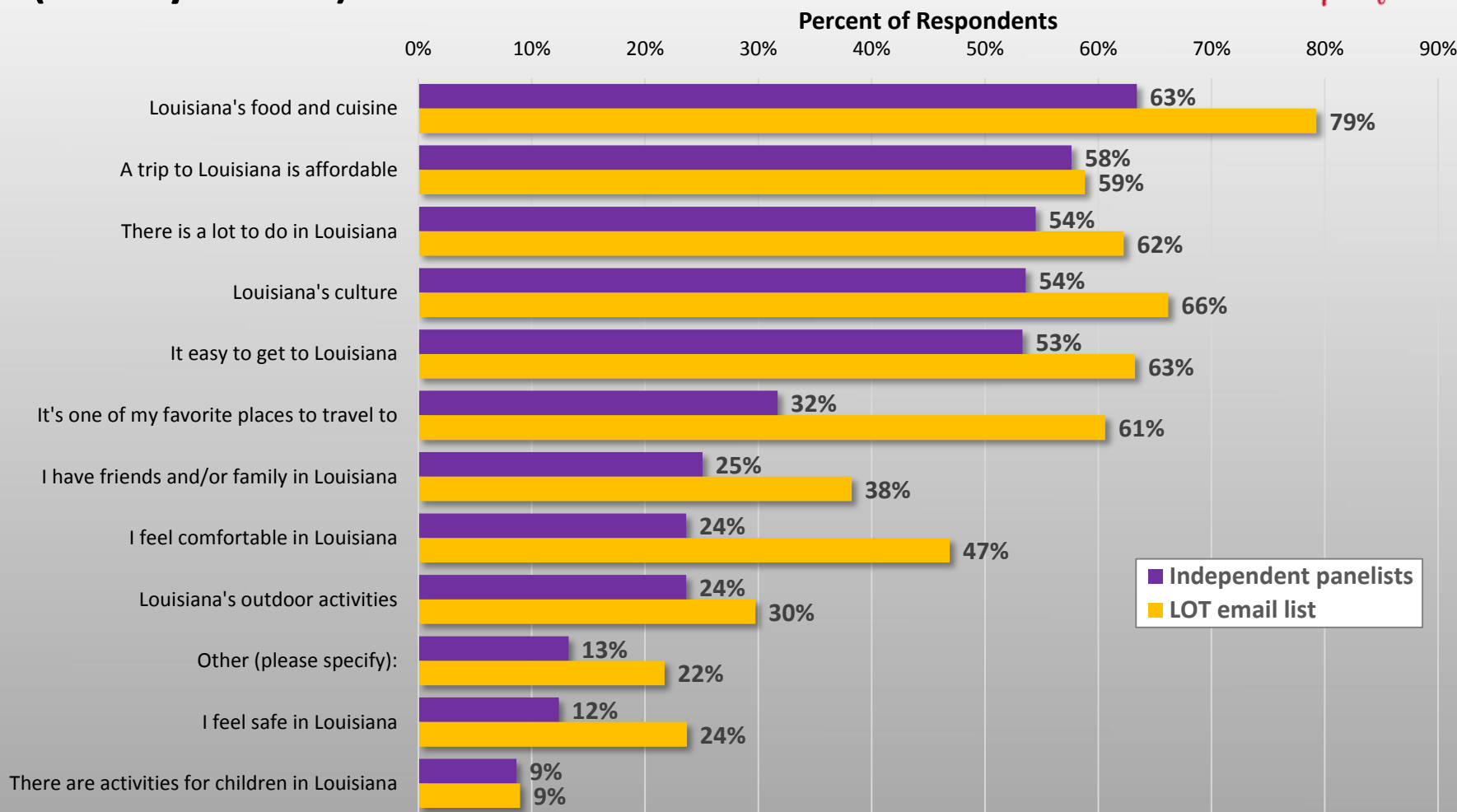
# Actions taken in anticipation of visiting Louisiana in next 12 months (if likely to visit)



Q42. In a previous question [Q16], you said you are likely or very likely or certain to visit Louisiana in the next 12 months. Which of the following have you already done?

***LOT listees are much more likely to have engaged with LOT information resources (LOT website, e-newsletter, Inspiration Guide) than panelists in anticipation of a future visit.***

# Reasons to visit Louisiana in next 12 months (if likely to visit)

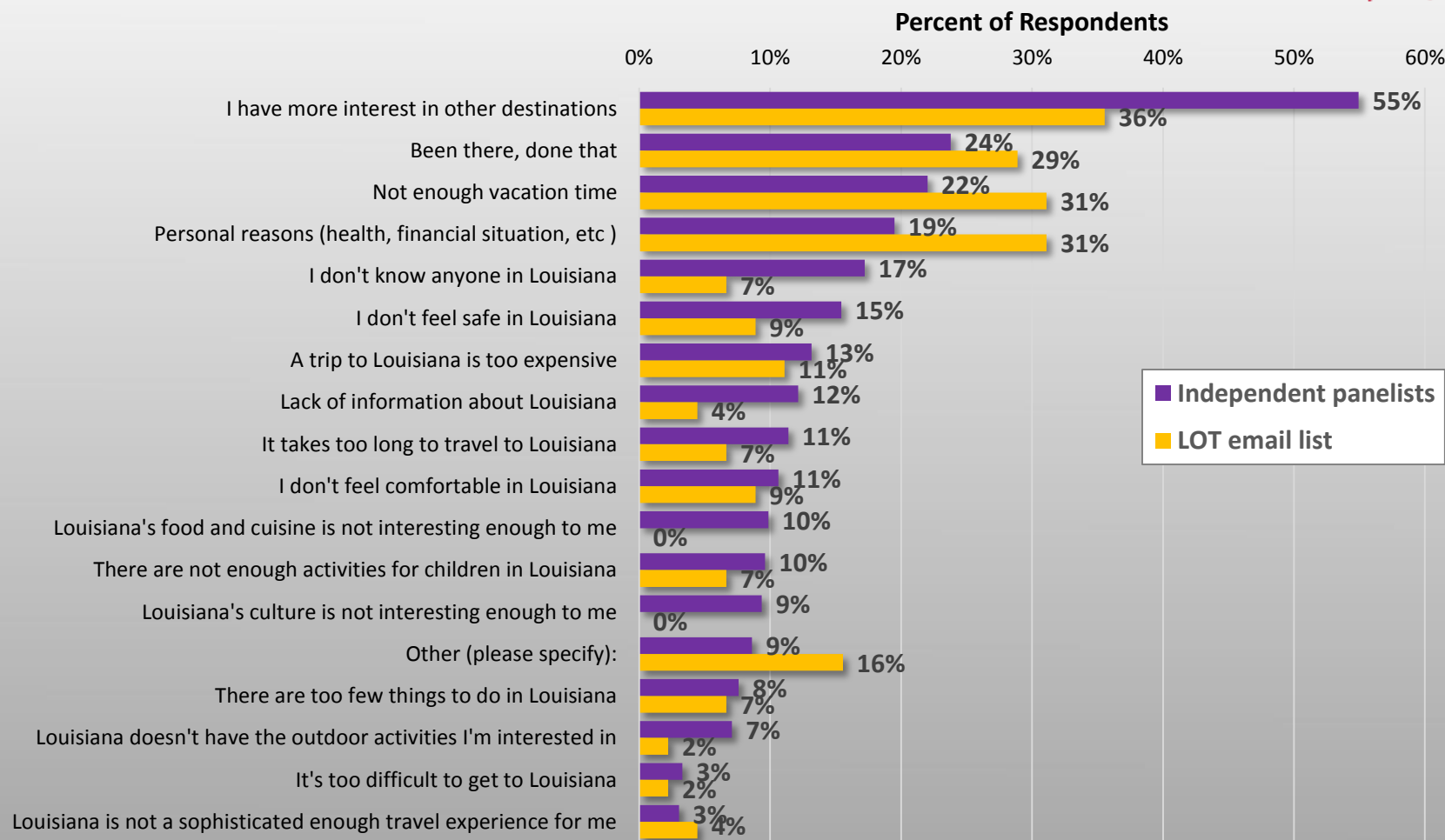


Q43. Which of the following describes why you are likely or very likely or certain to visit Louisiana in the next 12 months?

Base: Q16: Likely, very likely, or certain to visit Louisiana in next 12 months.

**Most popular reason for visiting among both groups is food/cuisine. Other leading reasons include affordability, lots to do in LA, culture, and ease of getting to LA. LOT Listees express more enthusiasm than panelists for almost all reasons.**

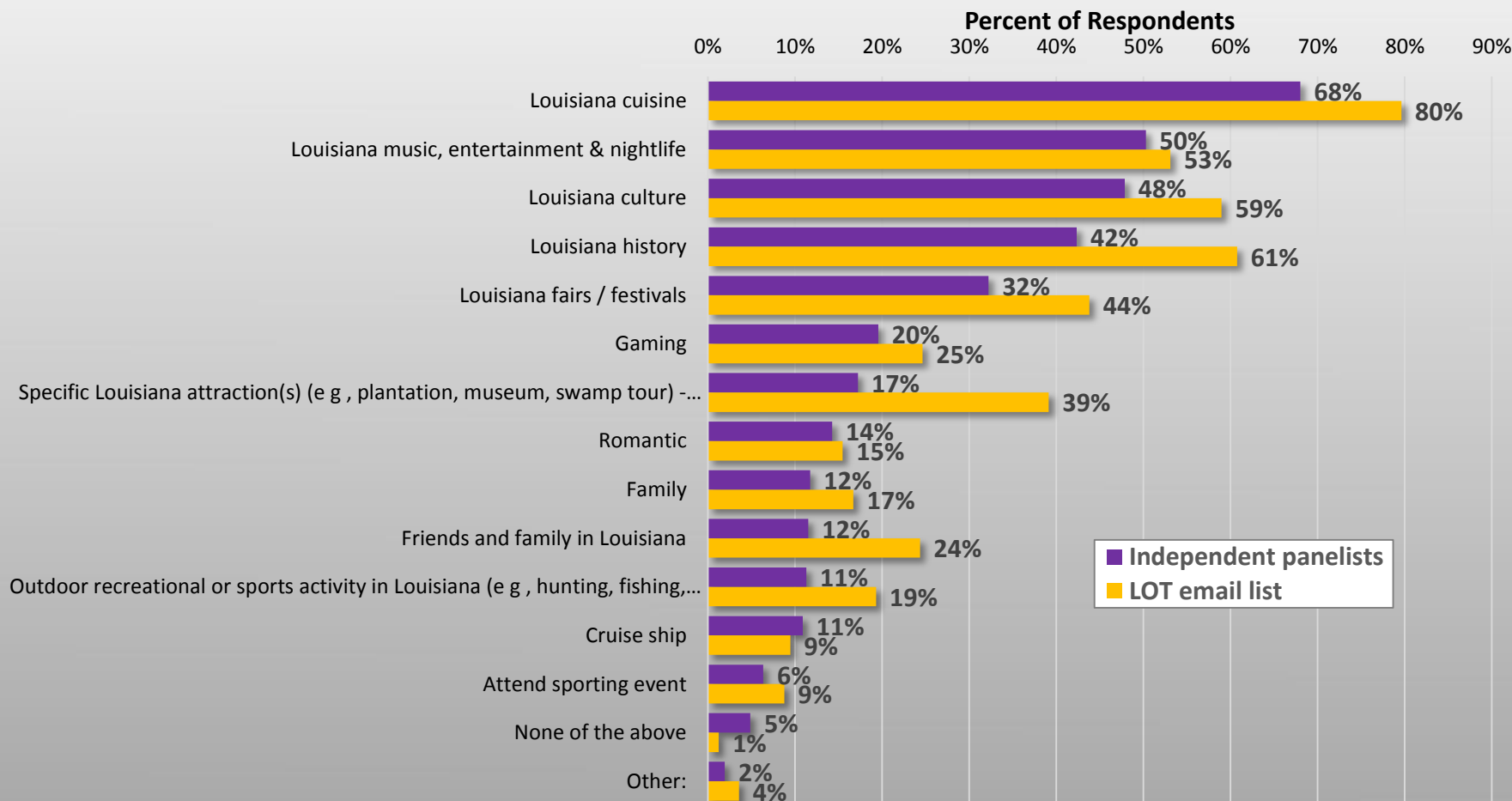
# Reasons for not visiting Louisiana in the next 12 months (if unlikely to visit)



Q44. In a previous question [Q16], you said you were "unlikely" or "very unlikely" to travel to Louisiana in the next 12 months. Which of the following describes why?

**Leading deterrent to visiting LA among both groups is more interest in other destinations. Secondary reasons for both groups include "been there/done that", not enough vacation time, and personal reasons (financial, health, etc.), among others.**

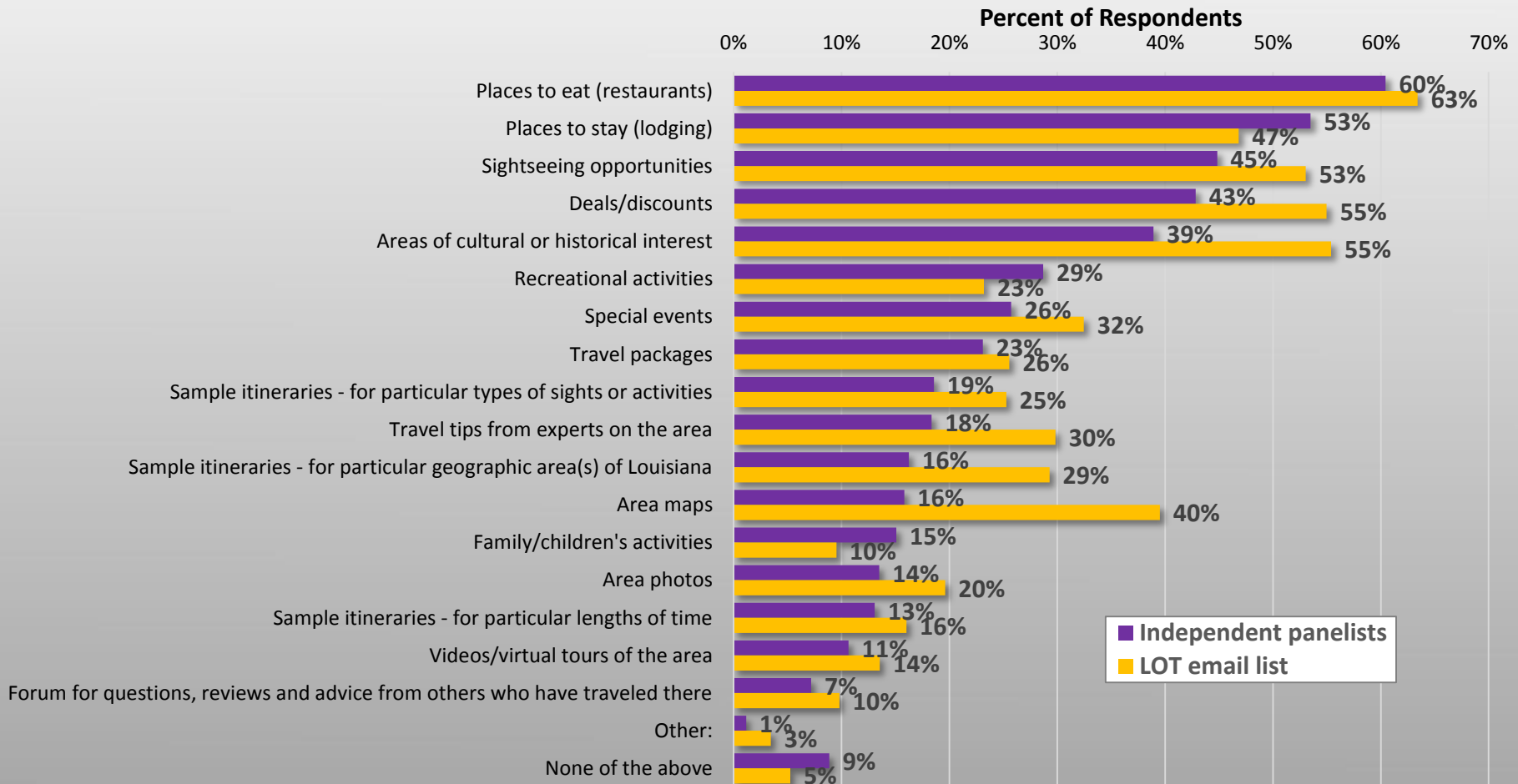
# Interest in Louisiana experiences on a future leisure trip



Q54. What would you be most interested in experiencing on a future leisure trip to Louisiana?

**Mirroring other results, cuisine again tops the list as a key interest, along with music/entertainment/nightlife, culture, and history, and other items. LOT listees express more interest than panelists in all items, further underscoring their enthusiasm.**

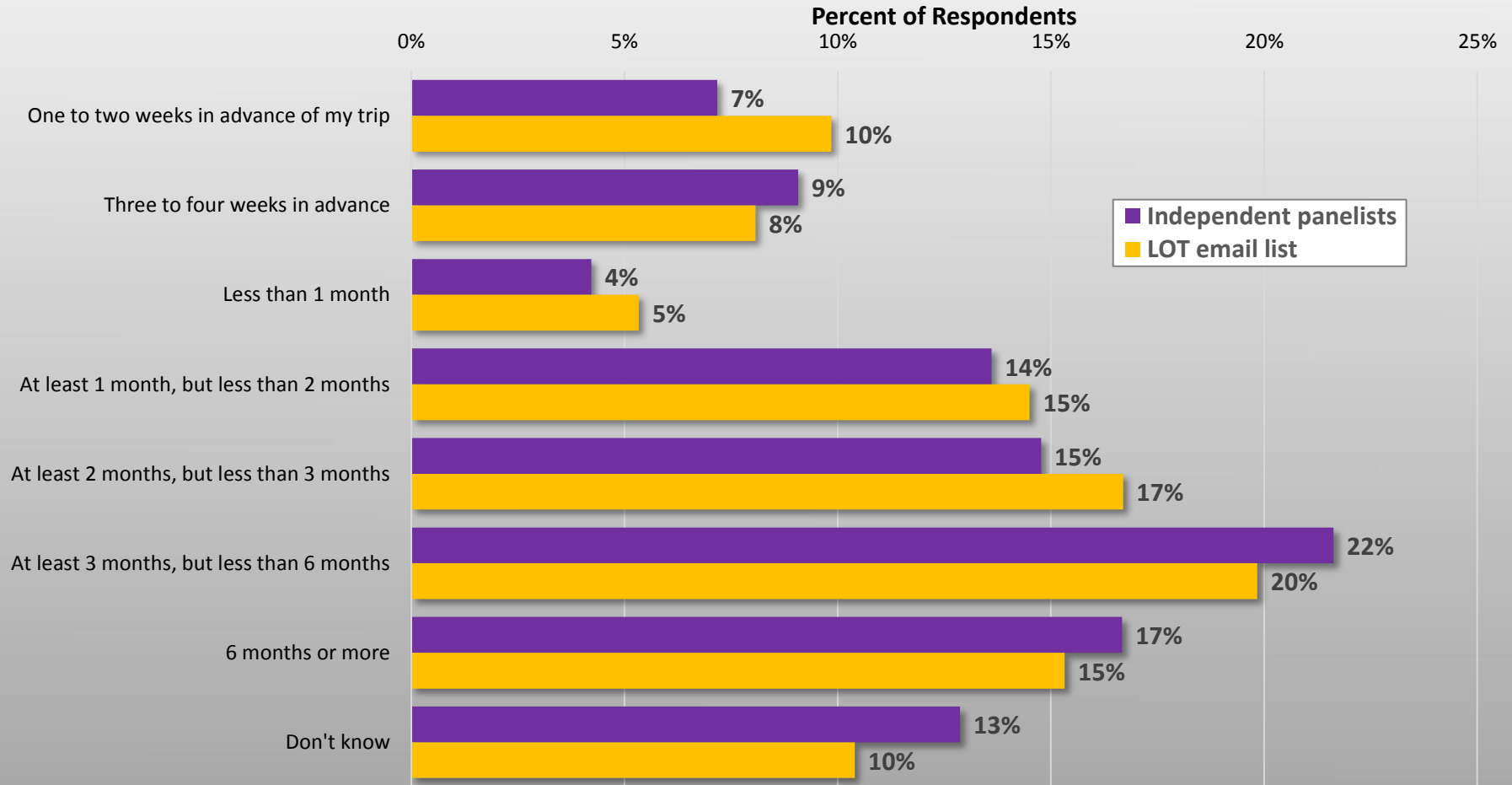
# Interest in further info about aspects of Louisiana



Q55. If you were to take a future leisure trip to Louisiana, about which aspects of Louisiana would you like to know more?

***Consistent with interest in cuisine, desire for restaurant info is high. Info about lodging, sightseeing opportunities, deals/discounts, and areas of cultural or historic interest is also widely sought.***

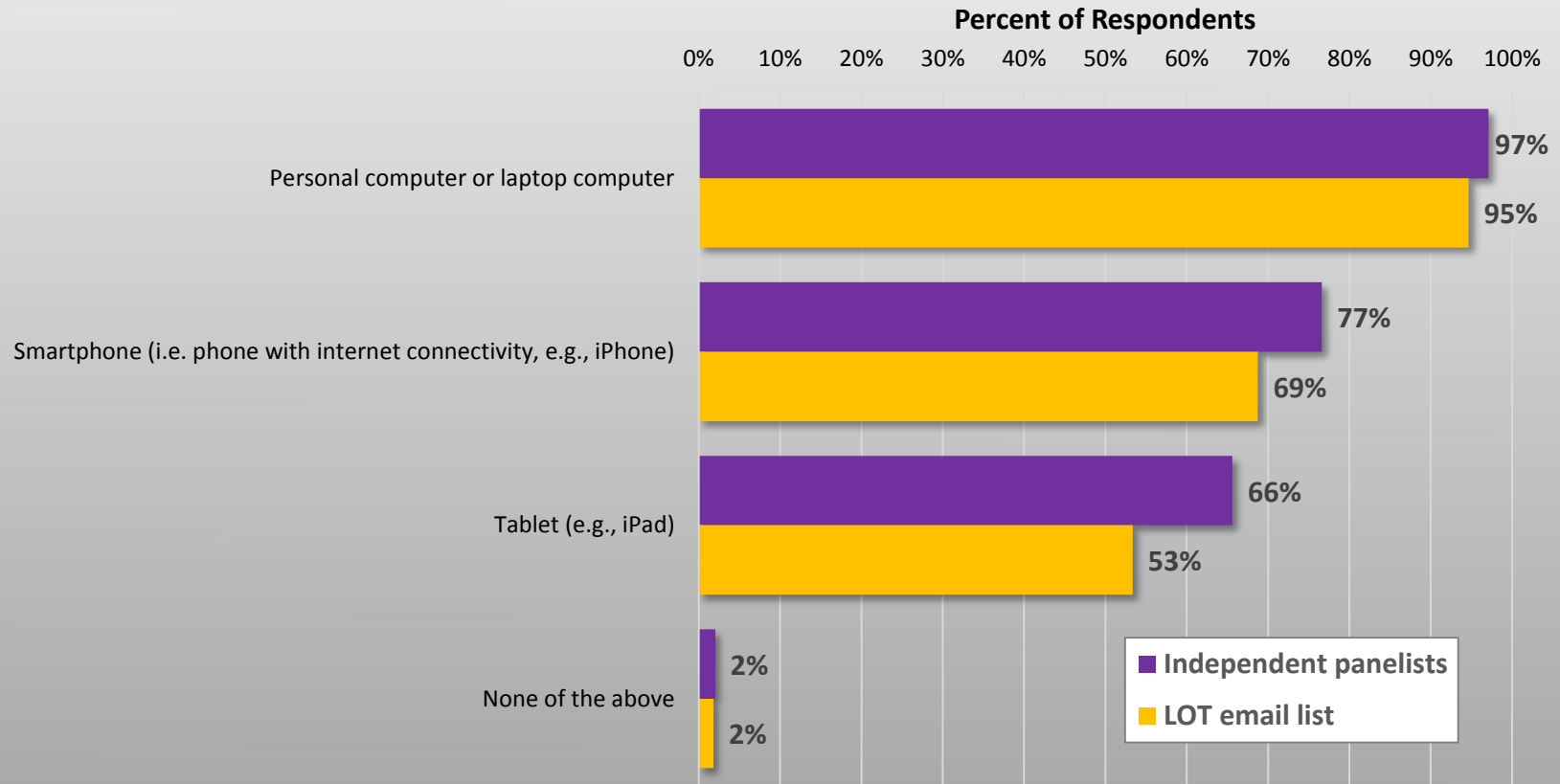
# Travel planning lead time



Q56. How far in advance of travel would you be likely to start planning a trip to Louisiana?

***Respondents in both groups have a wide diversity of trip planning windows, with about half of each group planning <3 months and 3+ months in advance. Panelists have slightly longer lead times.***

# Mobile technologies owned

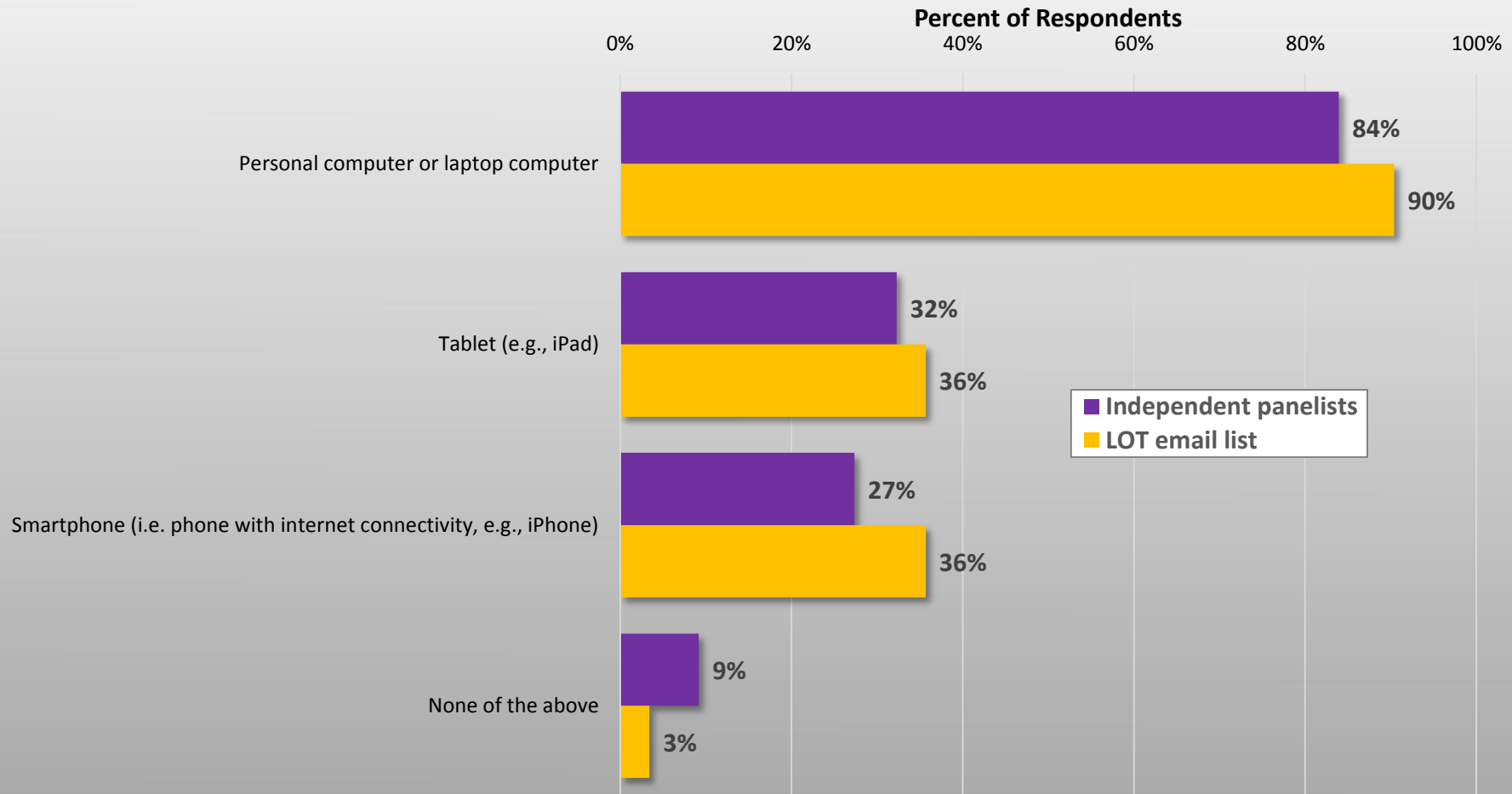


Q57. Which of the following devices with internet connectivity do you own?

***Most Panelists and LOT listees own smartphones (77% and 69% respectively) and tablets (66% and 53% respectively).***



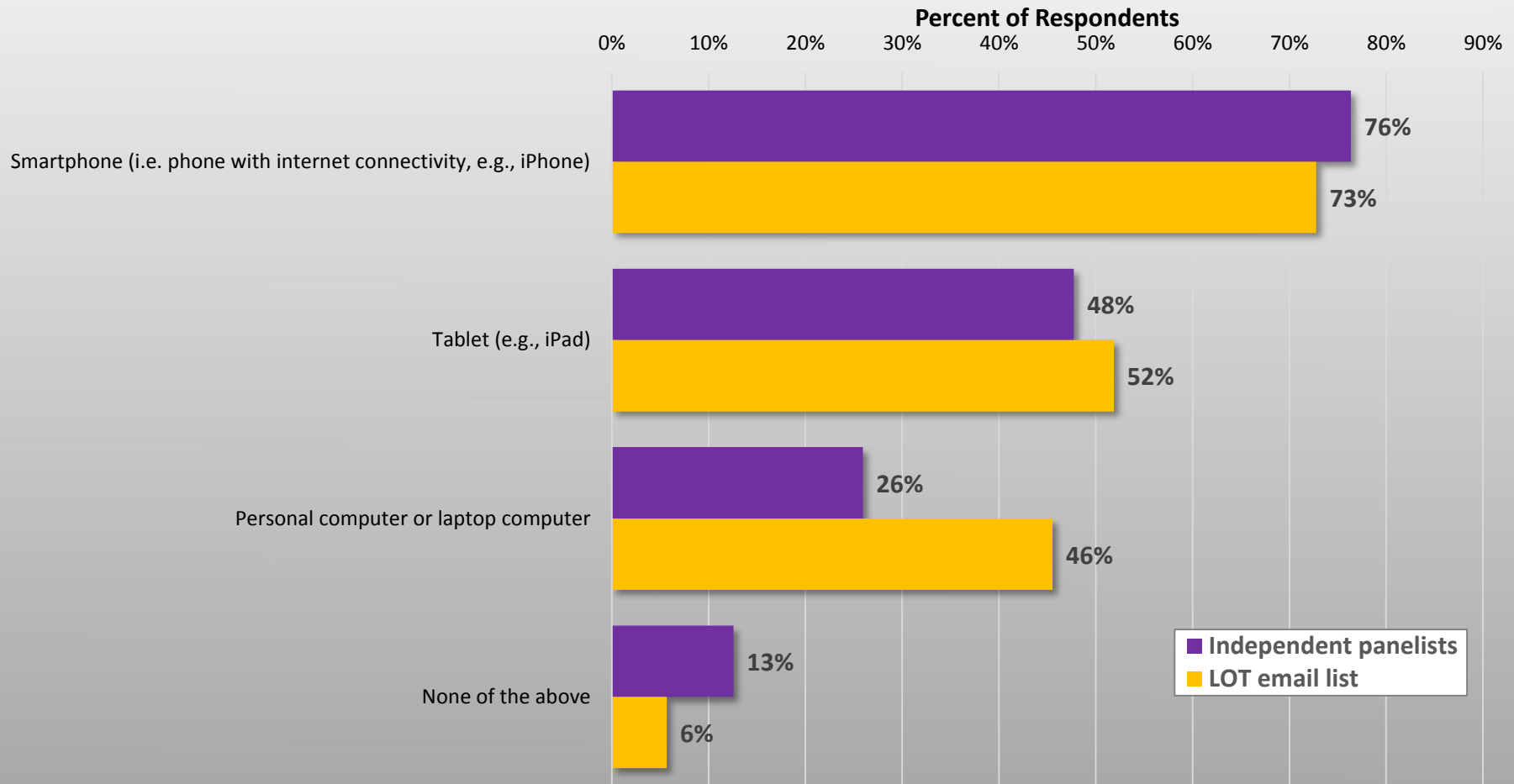
# Mobile technologies used to plan trip



Q57. Which of these devices, if any, would you likely use to research and plan a future trip to Louisiana, before leaving home?

***Both groups would be most likely to conduct pre-trip research using a personal/laptop computer (84-90%). Lesser shares would use a tablet (32-36%) or smartphone (27-36%).***

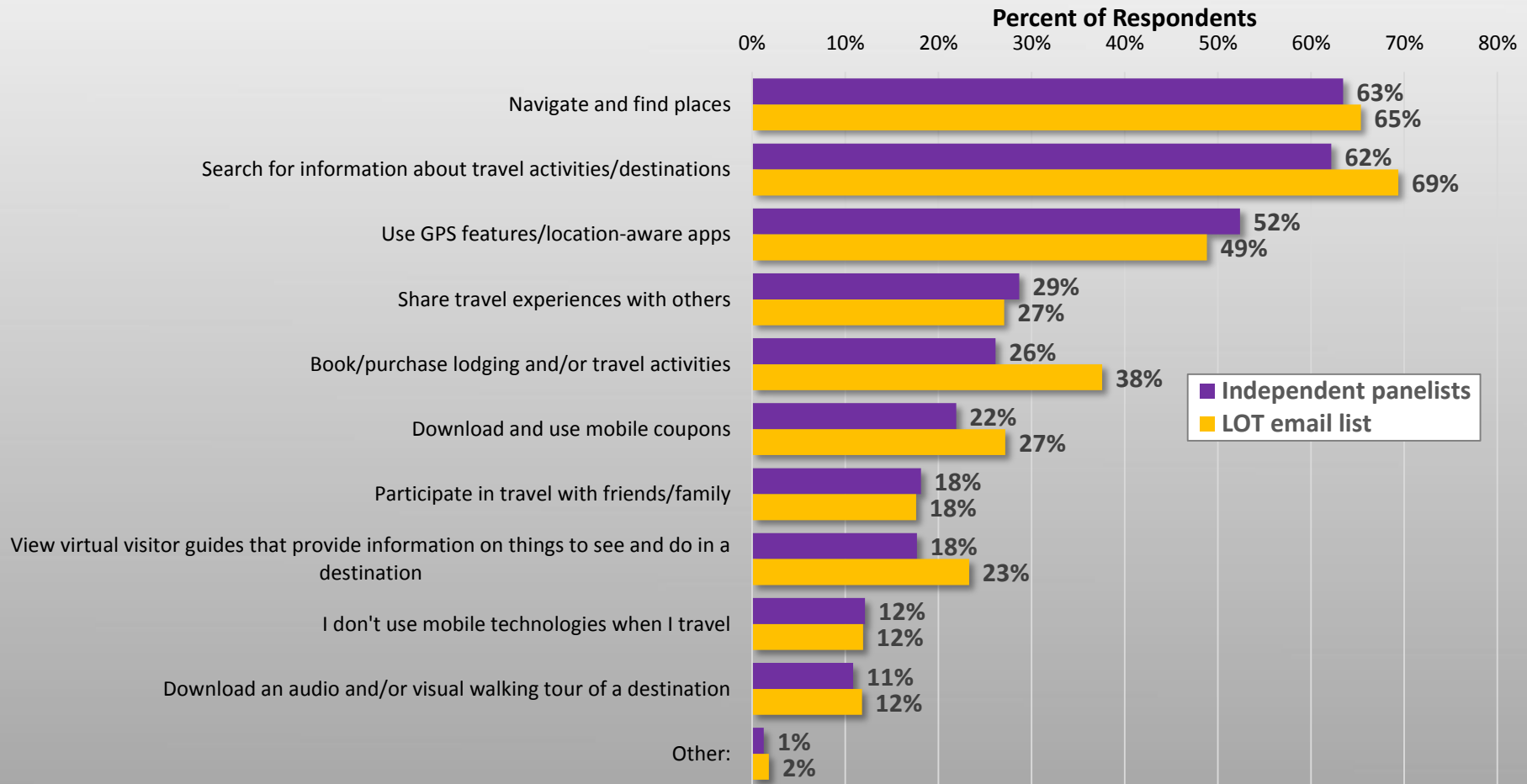
# Mobile technologies used during travel



Q57. Which of these devices, if any, would you most likely use to help plan or inform your visit while traveling in Louisiana?

**About three-quarters of both groups would likely use a smartphone while traveling in LA (76-73%). About half would use a tablet (48-52%).**

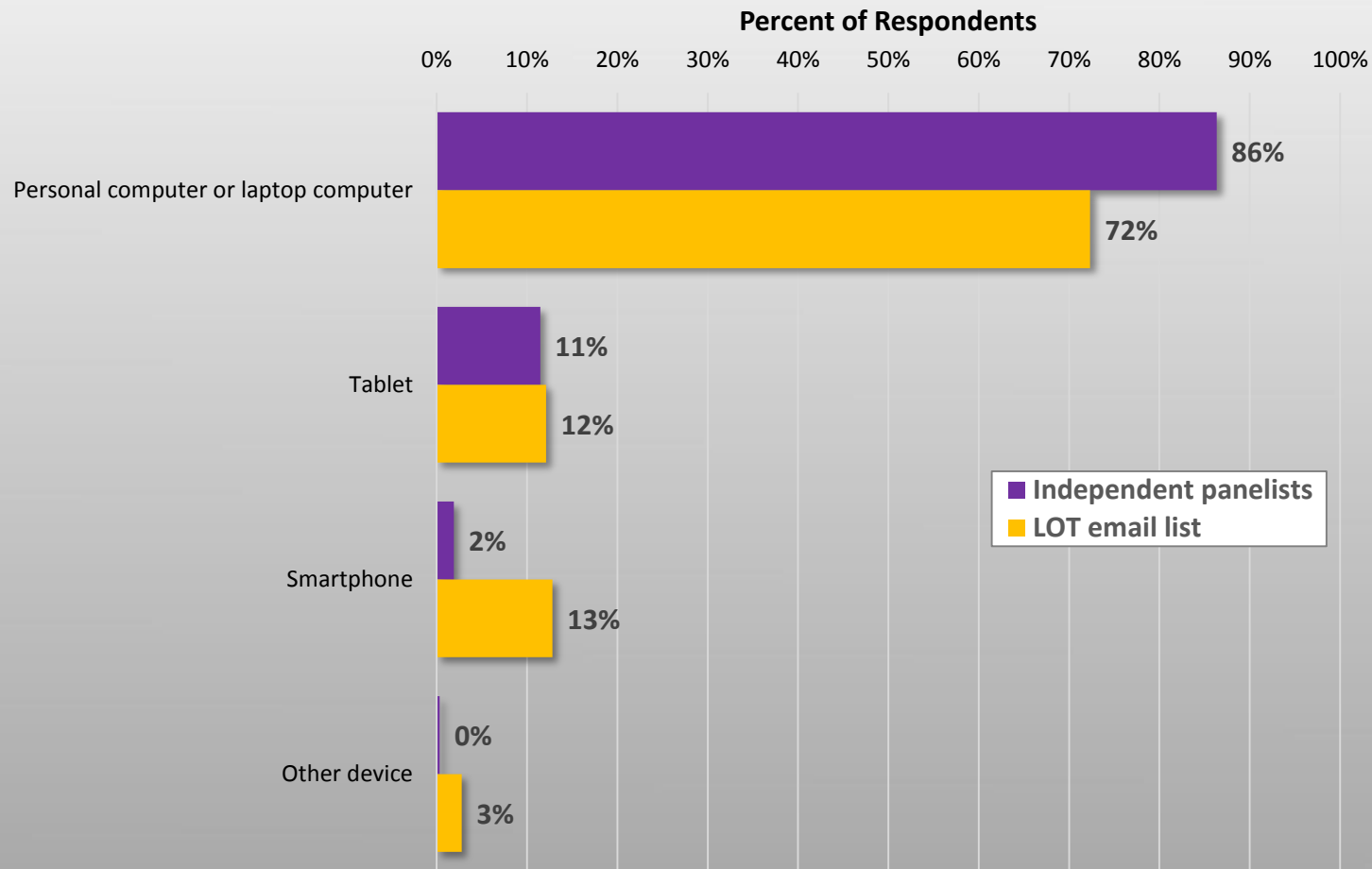
# Activities completed on mobile devices during leisure travel



Q58. Which of the following activities do you like to do with Internet-connected mobile devices while traveling for leisure?

**Respondents are especially likely to use mobile technologies for navigation (63-65%) and searching for info about activities/destinations (62-69%). About half use GPS features/location-aware apps (52-49%).**

# Device used to take survey



Q62. What device are you taking this survey on?

***Most panelists and LOT listees groups took the survey on a computer (86-72% respectively). However, notable shares used tablets (11-12%) or smartphones (2-13%).***

# Louisiana Brand Identity Study

## July 2014



***Thank you!***

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